

California Department of Veterans Affairs



BUSINESS PLAN STATUS UPDATE July 1, 2010 - June 30, 2015

JUNE 2011

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Veteran Services Division California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: Veterans Services/App for Vets

Strategy: Advocate for veteran benefits, promote participation by veterans in obtaining their benefits, and promote coordinated efforts by various veteran organizations.

Objective: Creation of application for veterans for I-phone and other handheld and desk top computers whereby the veteran or interested party can easily obtain information on veteran benefits and how to access them.
Projected Date for Achieving the Objective: The Droid App is already live and the Apple platform should be up by September 2011.
Performance Measures - Success will be determined by the progress made in creating the application and uploading the information. A September 1, 2011 date for launch is projected for the Apple platform. A marketing campaign will then be launched to advertise this unique service to veterans. A monitor of hits will also be measured monthly.
Resources There are some IT resources being used, but not measurable. This is a donation from a company that wants to help veterans and is doing it for free.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
Initial meeting with IT held in July 2010 for feasibility and start of project	December 2011	X
Project start	January 2011	X
Launch of project with proper media and public advertisement	February 2011	X
Droid Application complete/ awaiting testing for Apple application	September 2011	
		<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Project almost complete. Awaiting Apple version testing and implementation. This should happen by Sept. 2011.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: Veterans Services/ CCC

Strategy: Advocate for veteran benefits, promote participation by veterans in obtaining their benefits, and promote coordinated efforts by various veteran organizations.

Objective Statement:

Development of plans and drawings for CCC along with funding for this process that is now approximately \$2 million dollars

Projected Date for Completing Objective: 2014 for completion of project, 2012 for start of drawings and plans.

How will success/completion be determined (what are the metrics)? The success will be measured by the availability of funds (\$2 million) to start the project.

Resources Needed

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
Grant submitted to fund the construction and opening of this CCC	April, 2010	X
Meeting with the CCC community to facilitate funding of endowment account for operation	On going	<input type="checkbox"/>
Start CCC design and plan production	January 2012	<input type="checkbox"/>
Start construction	January 2013	<input type="checkbox"/>
Open cemetery	January 2014	<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

There is some activity from the FORA people and Assemblyman Monning to get the \$2 million need to get the project started. There have been communications from FORA that they have plans to have the money in the bank by this October.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: Veteran Services/ DMV MOU

Strategy: Advocate for veteran benefits, promote participation by veterans in obtaining their benefits, and promote coordinated efforts by various veteran organizations.

Objective: Utilize the DMV/MOU information to increase Compensation and Pension participation by California Veterans.

Background: Department of Motor Vehicles collaboration to outreach to all 2 million veterans. They have recently signed an MOU with DMV to have them place a line on all drivers license and ID card applications asking if the applicant served in the military. DMV will share this very fresh contact information with CDVA electronically. CDVA projects that this will give us the contact information and name of close to 20,000 veterans a month and all veterans in California within 5 years.

Projected Date for Achieving the Objective: July, 2011 CDVA will start getting information from the DMV drivers license and ID card process.

Performance Measures – The performance will be measured initially by the number of contacts we get from the DMV through the drivers license and ID card process. We hope to get thousands a month. The ultimate measurement will be the comp and pension participation rate and the federal dollars coming to this state and into the pockets of our veterans.

Resources Needed The budgetary resources needed will be approximately \$250,000.00 a year for the mailings and printing needed to reach out to these veterans initially. Additional costs will be incurred in the IT department as vet services increases the data base in CVCS and My Cal Vet to reach out to these veterans.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
Receive information from DMV	July 1, 2011	<input checked="" type="checkbox"/>
Formulate IT plan through the AE process to process DMV information and contact the veteran	September 2010	<input checked="" type="checkbox"/>
Mailer designed and produced to mail out to DMV identified veterans	October 2010	<input checked="" type="checkbox"/>
Contract procured with DVBE to do the outreach mailing	November 2010	<input checked="" type="checkbox"/>
Receive information from veterans and put into CVCS for continued referral and outreach	July 2011	<input type="checkbox"/>
Data base built up with all 2,000,000 veterans in it for outreach purposes	July 1, 2015	<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Vet Service met with DMV in September of 2010 and they informed us that the form will be changed on July 1, 2011. No information can be produced before that date. A trial mailer has been developed and Vet Services along with IT is defining the IT requirements for DMV. Information will start this month.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: Veterans Services/ Yountville Cemetery

Strategy: Become a national model for State Veteran Cemetery operations

Objective: : Improve and bring Yountville Cemetery up to BOSS standards
Veteran Service Division under the leadership of Steve Jorgensen will take over the operation and maintenance of the Yountville Cemetery and bring this cemetery up to VA standards using grant money from the VA.

Projected Date for Achieving the Objective: On-going

Performance Measures - The success of this operation will be gauged by the amount of federal funding we receive and the follow up audit that we will be subjected to after the funding is received and the improvement made to this neglected cemetery. Steve has hired a full time person using Vet Home funding to start the improvements

Resources Needed Using vet home funding, the budget is not an issue and is fully funded for this year and hopefully next year. Steve is using his existing resources to get this work done. VA grant will pay for most of the improvements and possibly the use columbariums for actual revenue enhancement given the new \$700.00 plot allowance.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
MOU between Vet Services and the Yountville Home	June 2010	X
Federal grant application submitted to the VA Cemetery Agency	June 2010	X
Audit of the Cemetery by the USDVA	July 2010	X
Results of the audit received and action plan developed	September 2010	X
Federal funds applied for to make the upgrades needed and action plan implemented	Oct 2010	x
Work started on the Yountville Cemetery to bring up to standards	November 2010	x
Work completed on the upgrade for Yountville Cemetery		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

The audit has been completed and Steve has drawn up and action plan for improvement of Yountville. A person has been hired and is beginning to work on the grounds. Funding has been approved for the design portion of the upgrade using Geo-Bond monies to be paid back from the Federal Grant. The project is moving along nicely. Steve is currently working with the new person to move dirt and officially start the overhaul of this cemetery. A 5 year plan has been developed by Steve Jorgensen and Dave Gerard and is currently being implemented.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: Veterans Services/ CCC

Strategy: Advocate for veteran benefits, promote participation by veterans in obtaining their benefits, and promote coordinated efforts by various veteran organizations.

Objective Statement:

Development of plans and drawings for CCC along with funding for this process that is now approximately \$2 million dollars

Projected Date for Completing Objective: 2014 for completion of project, 2012 for start of drawings and plans.

How will success/completion be determined (what are the metrics)? The success will be measured by the availability of funds (\$2 million) to start the project.

Resources Needed

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
Grant submitted to fund the construction and opening of this CCC	April, 2010	X
Meeting with the CCC community to facilitate funding of endowment account for operation	On going	<input type="checkbox"/>
Start CCC design and plan production	January 2012	<input type="checkbox"/>
Start construction	January 2013	<input type="checkbox"/>
Open cemetery	January 2014	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

There is some activity from the FORA people and Assemblyman Monning to get the \$2 million need to get the project started. Only time will tell.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: Veteran Services-Vet Rep Academy

Strategy: Provide high quality veteran claims representation.

Objective: Creating a formal training process for CVSO's their employees and state employees by creating and managing a VET REP academy at CDVA. This academy will train new vet reps and new CVSO's in the claim filing and processing activities. This academy will also provide a connection to Cal Vet Connect and the Vet Pro computer and information management system. CDVA will oversee this operation and have at least two academies a year, one if No Cal and the other in So Cal. Top CVSO's, Norm Gillette, CVSO staff and VA experts will be the instructors. We will also include VSO's in the process to create a better connection between the CVSO and VSO community

Projected Date for Achieving the Objective: May 2011

Performance Measures The success will determined initially by having the first class and then using the Vet Pro information to track the effectiveness of the CVSO's who have been through the course in the areas of number of ready to rate claims filed, the success of those claims and the amounts of compensation dollars received by the veterans.

Resources Resources need for this process is approximately \$40,000.00 a year in the form of a contract. Vet services will continue to work with contracting to make this happen. A contract will be let in August 2011 to get this next phase under way. Two classes have been completed and 5 classes a year are planned.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
Create an formulation and action committee to include CSVO and CDVA leadership to create the structure of this academy	Sept 2010	X
Request and process a contract to fund this process	Sept 2010	x
Develop MOU CVSO to include participation in this process	February 2010	<input type="checkbox"/>
Let contract to fund this process	Oct 2010	X
Conduct first Vet Rep academy class at CDVA	May 14 2011	x

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Vet Services has conducted two classes already in April and May 2011. Our contract was disapproved by DGS and we are looking to let another contract by October 2011.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: Veterans Services/DVBE

Strategy: Improve Statewide DVBE operations and participation.

Objective: Vet Services has a goal of 3% for state participation in the award of state contracts to DVBE business owners.
Projected Date for Achieving the Objective: January 1, 2012
Performance Measures DGS publishes the participation rate for state contracting annually. The last report had the rate at 2.97%. Vet Services fully expects to hit and surpass the 3% rate this year.
Resources Needed DGS supports our outreach with a contract of \$176,000.00 a year. The expenditures so far show a trend to be right at plan by June 30, 2011.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
Continue the on-going efforts of the CDVA DVBE Outreach and Education Coordinator's by creating inter-agency synergy, effectively utilizing our dwindling resources, and getting the DVBE message out.	Ongoing	
Mailing out to disabled veterans a DVBE fact sheet encouraging the veterans to contact Bob & Stewart our DVBE specialists. 2000 mailed out February 4, 2011	February 4, 2011	X
Attending the large-scale (Over 3300 people attended last FY) Governor sponsored regional Collaboration Conferences. There are five conferences statewide.	Ongoing	X
Energizing and guiding the CDVA DVBE Advisory Council to become a more active player in the DVBE community. Vet Services reconstituted the DVBE Council to add more members and people from the contracting community for input.	Ongoing	X
Hired new RA, Gloria Anderson, funded by DGS to rewrite DVBE and SB regulations and procedures to improve the ease of use for DVBE applicants	Feb 4, 2011	X

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Vet Services has tasked the SVBE specialist to visit the top non-performing DVBE advocates in the next 6 months to school them on how be more active with DVBE contractors. Vet Services has revamped the DVBE Council to include new more active members who are not necessarily DVBE's but are in the business of contracting with them. Obtained a list of veteran owned businesses in California and are contacting them to determine who is not enrolled as a DVBE. Obtaining mailing lists from the SAIS data bases to do outreach for DVBE purposes with disabled veterans. Hiring Gloria Anderson as an RA from DGS to help our DVBE staff and rewrite the DVBE regs for DGS and CDVA. DGS will fund this activity.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: Veterans Services

Strategy: Increase the number of Veteran Treatment Courts in California

Objective Statement: : Creation and proliferation of Veteran Courts in California modeled after the Orange County and Santa Clara models. Decrease the number of veterans remanded to incarceration and instead get them into VA and other non-jail treatment facilities while helping them participate in the VA benefit system.
Projected Date for Completing Objective: 12 VTC's up and running in FY 11
How will success/completion be determined (what are the metrics)? Number of Veteran Courts up and running at a given point in time. 11 was the Goal in FY 11. It has been achieved. Project 20 by the end of FY 12.
Resources Needed: The new VTC and Homeless coordinator is well within our budget and we will make plan this year.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
Establish targeted counties to concentrate effort and resources to aid in establishing Vet Courts.	June 30, 2011	X
Establish partnerships and membership in the Administrative Office of the Courts pilot group to proliferate VTC's.	May, 2011	X
Target and meet with new counties for meetings dealing with VTC's.	September, 2011	<input type="checkbox"/>
Establish 8 new VTC's by July 2012	July, 2012	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Currently California has LA, SD, San Bernardino, Orange, Santa Clara, Tulare, Ventura, San Joaquin, Nevada, Kern and Sonoma County on line with VTC's. Coming soon should be Monterey, Alameda, Santa Barbara, Solano, Lake and El Dorado Counties. Vet Services is now represented on the AOC VTC group and are meeting regularly with counties interested in this process.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: Veteran Services Title 38

Strategy: Title 38 expansion into compliance instead of approval in order to more proactively help veterans obtain their education benefits.

Objective: title 38 has been historically an approval agency, approving courses at the over 600 IHL's in California. Vet Services wants to change their focus to dealing with compliance issues and being more proactive in helping veterans with problem schools instead of approving classes at UC's, CSU's and CCC's. these schools are all scrutinized by many other agencies and Title 38 can better use their time for outreach to veterans and working with problem schools that take advantage of veterans.

Projected Date for Achieving the Objective: The change from approval to compliance will take place in November/December of 2011.

Performance Measures – The approval activity will cease when approved by the federal VA and compliance will begin. Monthly reports from the manager of Title 38 will document the progress made by the title 38 workers. Regular reports are also sent to the VA documenting activity.

Resources Needed Title 38 activities are funded by the federal VA and the contract has been in the area of \$1.3 million.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
Negotiations with federal VA on switch from approval to compliance and outreach.	November 2011	<input type="checkbox"/>
Begin the new activities in the IHL's of California.	January 2012	<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

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California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: Veteran Services-Vet Pro

Strategy: Improve processes related to county veteran services office operations

Objective: Align all 56 CVSO's and District Offices into Vet Pro

To switch all 56 CVSO and 3 DO's to the Vet Pro platform for filing claims with the VA. This will improve the auditing capabilities of this agency and give CDVA review of productivity of these offices. This will ultimately lead to the filing of paperless claims in line with the initiative of the VA to go paperless by 2012.

Projected Date for Achieving the Objective: July 2012

Performance Measures - The success of this initiative will be initially measured by the number of offices converted to the SAIS system. The follow up goals will be measured by the improvement in the number and quality of the claims processed by the CSVO vet reps. This system will give CDVA the ability look into all offices and actually rate and grade the efficiency and effectiveness of each vet rep. A grading system will be developed and made public to let each vet rep and CVSO know how they are rated as to their quality and quantity of claims filed. This system will also create a paperless environment for reporting subvention information and lead to a paperless claim filing process when the VA goes to paperless filing. Auditing of CVSO's can be done from this office, thus avoiding costly travel.

Resources Needed This funding has already been approved by the legislature and the source of it is the VSOF fund that is replenished by license plate sales. The outlook of continued funding is good.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
SAIS approved by OCIO	May 2010	X
MOU signed with Panoramic Software for implementation	May 2010	X
Budget approved by conference committee to fund SAIS	June 2010	X
Budget passed with SAIS funding	Oct 2010	X
Conversion Plan meeting and schedule developed with Panoramic	July 2010	x
Conversion of offices started	Sept 2010	x
Payments distributed to CVSO's for Vet Pro software	Nov 2010	x
Centralize auditing performed from this office instead of onsite visits	January 2012	
Analysis of vet reps performance and feedback	July 2012	
Purchase and deployment of scanning devices for paperless claim processing	July 1, 2012	
Paperless claim filing (depending on VA implementation)	July 1, 2012	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Vet Services in conjunction with Vet Pro has started the migration of Vet Pro to over 44 offices. The remainder of the 12 counties will be accomplished by January 2012. The MOU with Vet Pro has been signed and this project is moving ahead of schedule. The original completion date was July 2012. Project is on schedule and progressing nicely.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: Veterans Services/Homeless Veterans

Strategy: Significantly prevent and decrease the homeless veteran population in California from 16 percent to 8 percent of the national total by 2014.

Objective: Utilize the veteran homes as partners in reducing the number of homeless veterans in California.

Projected Date for Achieving the Objective: The long term goal is to cut homeless to 8 percent by 2014.

Performance Measures The homeless veteran count is performed every year in January and Vet Services will use this count to track the reduction in homeless veterans.

Resources Needed Vet Services has just hired a full time homeless coordinator and facilitated MOU's with at least 5 NGO's to get homeless veterans into our existing homes.

Budget: Homeless Coordinator \$80,000.00 In budget, \$60,000.00 for Stand Down Support in budget.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
Identify gaps in service	01-31-2011	X
Discuss options with Homes Division/Managers	01-31-2001	X
Simplify CalVet Home application process	09-01-2001	<input type="checkbox"/>
Coordinate conference between NGO's and CalVet Home providers	06-10-2011	<input type="checkbox"/>
Establish work groups to create MOU's between NGO's and CDVA for "warm handoff"	03-10-2011	X
Designate liaison between local transition home and CalVet Home	10-01-2001	<input type="checkbox"/>
Suuport the 28 to 30 Stand Downs across the state with financial support and personnel when possible.	Ongoing	X
Develop Homeless strategy for the legislature	May 30,2011	X

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Vet Services has hired Veronica Badillo as a full time homeless coordinator, Vet Services also has facilitated the MOU's with at least 6 different NGO's and the Homes for the warm handoff for homeless vets who come out of the transitional housing of the NGO.
Vet Services is working on a Homeless Strategy report for the legislature that was turned in May 30.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: Veterans Services/Incarcerated Veterans

Strategy: Provide transitional assistance for incarcerated veterans upon release and assist them in obtaining the necessary resources needed to prevent recidivism.

Objective: Partner with CDC, VA, NGO, CVSO to have a safety net for released convicts to get them medical care, housing, claim filing and employment to reduce the recidivism rate.
Projected Date for Achieving the Objective: July 1, 2011
Performance Measures This activity will be measured by the contacts made by the outreach personnel and the recidivist rate of the released veterans. This will be tracked by the Vet Pro system at the CVSO operation.
Resources Needed Currently this initiative is being performed by existing vet services staff including the new homeless coordinator. Vet services expense for this position is \$80,000.00 and vet services is well on track to make their plan.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
Meet with CDC and start process for MOU	February 2011	x
Connect with VA Social Justice Outreach and develop MOU's	May, 2011	X
Identify liaison to conduct outreach to facilities in 3 counties LA, SB & SD using LINC's, CVSO's and VSO's.	September 15, 2011	<input type="checkbox"/>
Develop needs assessment based on outreach in pilot counties.	September 15, 2011	<input type="checkbox"/>
Identify other counties to spread the outreach process	November 15, 2011	<input type="checkbox"/>
Develop training to share with CVSO's in the October training cycle.	February 2012	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Vet Services has established contacts in the CDC and the VA for outreach to the three pilot sites. A conference call was held with the VA Justice Outreach personnel from VISN 22 and 21. Outreach to the jails and prisons in the three aforementioned counties is the next step.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: Veteran Services/LGBT Initiative

Strategy: Access Needs and formulate strategy to meet the needs of LGBT Veterans

Objective: Develop a strategy for action by assessing the needs of the LGBT Veterans in California.
Projected Date for Achieving the Objective: July 1, 2012
Performance Measures – Vet Services performance will be measured by the actual implementation of the LGBT needs assessment including training of state and county employees as to the needs of these special veterans who have special needs. The training of CVSO's in dealing with bad paper and traumatic treatment of these veterans will be measured by the discharge upgrades filed and the number of comp claims filed for these veterans who were not eligible for some veteran benefits prior to the repeal of the don't ask don't tell policy of the armed forces.
Resources Needed CDVA is planning to hire or contract with employees to help deal with the LGBT veterans statewide. We are anticipating getting some grant funding for this endeavor. Several sources have been identified already.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
Assess needs of the LGBT veterans	December 2011	<input type="checkbox"/>
Develop strategy to meet the indentified needs	December 2011	<input type="checkbox"/>
Apply for grant funding for this activity decided upon to address needs.	January 2012	<input type="checkbox"/>
Begin training of the state and CVSO employees on needs of LGBT	January 2012	<input type="checkbox"/>
Full implementation of program	March 2012	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

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Women and Minority Veteran Affairs
California Department of Veterans Affairs
Business Plan
Plan of Action Worksheet

Division: Women and Minority Veteran Affairs

Strategy: Expand outreach activities to veterans specifically focusing on women and minority veterans

Objective 1.2.1: Develop and conduct various activities to reach out to women and minority veterans.
Projected Date for Completing Objective: Ongoing
How will success/completion be determined (what are the metrics)? Report on the number of veterans contacted, reintegration forms filled out and percent increase in women and minority contacts in database.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
Maintain a communications plan that includes indicators for determining the effectiveness of all outreach activities and where to focus outreach efforts	ongoing	<input type="checkbox"/>
Assess and report on the success of targeted outreach effort to Hispanic veterans in LA Basin (Santa Fe Communications)	Oct 31, 2011	<input type="checkbox"/>
Develop a plan to deploy additional pilot projects to target various minority veteran groups modeling from the lessons learned from Santa Fe contract targeting Hispanics;	January 2012	<input type="checkbox"/>
Implement outreach plan that targets non-traditional veteran organizations, such as : African American Churches; Hispanic Churches, Ethnic Chambers of Commerce, non-profit organizations, charitable organizations. etc.	August 2011	<input type="checkbox"/>
Host a forum with minority leaders to develop strategies for addressing service gap surrounding benefit utilization by minority veterans	June, 2012	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

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**California Department of Veterans Affairs
Business Plan
Plan of Action Worksheet**

Division: Women and Minority Veteran Affairs

Strategy: Develop and conduct appropriate advocacy activities that will target women and minority veterans

Objective 1.2.2: Identify and pursue advocacy opportunities that target the interests of women and minority veterans.
Projected Date for Completing Objective: ongoing
How will success/completion be determined (what are the metrics)? Track number of corporations with formal partnerships and percent increase over prior year.

Plan of Action Timeline Progress

What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
Partner with the California Commission on the Status of Women to revise women veterans 2008 survey tool and conduct survey at the annual women veterans conference and via website to focus California's policy making for the future.	Oct. 2011	<input type="checkbox"/>
Establish and expand partnerships with corporations, organizations, commissions and other agencies to address identified needs of women and minority veterans (ie DeVry University, Talbots Stores, PG&E)	Ongoing	<input type="checkbox"/>
Partner with Commission on the Status of Women, service provider, VSOs and VA representatives in determining the need for state and federal legislation that would benefit women veterans	March, 2012	<input type="checkbox"/>
Communicate women and minority veterans' needs to national committees for appropriate actions and pursuit of legislation at the federal level	Ongoing	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

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**California Department of Veterans Affairs
Business Plan
Plan of Action Worksheet**

Division: Women and Minority Veteran Affairs

Strategy: Educate women and minority veterans regarding earned benefits and available services

Objective 1.2.3: Conduct educational presentations and develop educational programs that target the needs of women and minority veterans
Projected Date for Completing Objective:
How will success/completion be determined (what are the metrics)? Track the number of veterans utilizing benefits, reflect the increase over prior year, number of MOU's with regional collaboratives, number of forums held, track the number of veterans participating in forums and number of new reintegration forms generated as a result. The goal is a 5% increase in MOUs by June 2012

Plan of Action Timeline Progress

What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
Host annual CalVet Women Veterans Conference	Annual	<input type="checkbox"/>
Participate in women veteran programs, conferences, stand downs, etc. to provide regular updates on benefits, legislation, and new services.	Ongoing	<input type="checkbox"/>
Collaborate with regional coordinators of the 9 state wide collaboratives to host quarterly forums for the dissemination of updated information on benefits and services to service providers on women and minority veterans issues and concerns	Quarterly 4 th qtr, 2011	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

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Native American Veteran Affairs

Division: Native American Veterans Affairs

Strategy: Foster collaboration and improved communication with Native Americans.

Objective Statement: Reach 50% of all Native American tribes in California
Projected Date for Completing Objective: September 30, 2015
Performance Measures Number of Native American Veterans who complete the Reintegration Form Publish the "California Drum Beat" newsletter bi-annually
Resources Needed (include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources). Funds needed for Drum Beat Newsletter

Plan of Action Timeline Progress

What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
Develop a database of Native American Veterans' contact information	Ongoing	<input type="checkbox"/>
Set up a tool to sign in	9/30/10	<input type="checkbox"/>
Have a sign up date event – San Diego	9/30/10	<input type="checkbox"/>
Ask for rosters of Native American Vet Organizations in the state	Ongoing	<input checked="" type="checkbox"/>
Create and distribute a "California Drum Beat" newsletter for Native Am. Vets	11/1/11	<input type="checkbox"/>
Research information for newsletter	Ongoing	<input type="checkbox"/>
Publish twice a year	9/30/11	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

<p>I continue to Outreach to Indian veterans in the State</p> <p>Database is in progress</p> <p>Reintegration forms are being distributed at outreach Indian events</p> <p>Drum Beat news letter</p> <p>Pending looking for funds</p> <p>I continue to outreach to tribes in California. I have had the honor to meet, interview, and collaborate with 45 tribes in California. I have also met with tribal representatives throughout the</p>
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state.

Database for Native American veterans is in progress. I have received two rosters with Native American names from Indian organizations. American Indian Veteran Association (AIVA) and Native American Veteran Association (NAVA)

Drum Beat Newsletter is still pending first issue - Target month Sept 2011

**California Department of Veterans Affairs
Business Plan
Plan of Action Worksheet**

Division: Native American Veterans Affairs

Strategy: Expand outreach activities to Native American veterans, their families, and dependents.

Objective Statement: Establish relationships with all tribes in California by 2016
Projected Date for Completing Objective: 2016
How will success/completion be determined (what are the metrics)? Establish MOU's with 25% of all Indian Health Services, Urban Health Care Centers, and casinos.
Resources Needed (include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources). Resources (personnel) needed for outreach/participation of CDVA in the American Indian Veteran State Conference (Sept 14-15, 2011) on the Pala Reservation. Resources needed for participation at CA Native American Indian Day. \$500 for a table plus personnel to outreach

Plan of Action Timeline Progress

What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
Outreach as needed - Pow Wow	Ongoing	<input type="checkbox"/>
Native Gatherings and events	Ongoing	<input type="checkbox"/>
Outreach to three areas of California:	Ongoing	<input type="checkbox"/>
Northern-3		<input checked="" type="checkbox"/>
Central-9		<input checked="" type="checkbox"/>
Southern-7		<input checked="" type="checkbox"/>
Facilitate communication between the VA hospitals and the Indian Health Services (IHS) and Urban Health Care Centers	Ongoing	<input checked="" type="checkbox"/>
Contact Leadership at IHS to help identify Indian vets in clinics	12-10-11	<input checked="" type="checkbox"/>
Contact Urban Leadership	9-10-11	<input checked="" type="checkbox"/>
Implement VHA/IHS collaborations to develop MOUs with IHS Area Offices	6/30/12	<input type="checkbox"/>
Visit IHS and Urban Clinics	Ongoing	<input checked="" type="checkbox"/>
Visit VA Hospitals	Ongoing	<input checked="" type="checkbox"/>
Visit CDVA Homes	Ongoing	<input type="checkbox"/>
Develop Partnerships with Casinos	Ongoing	<input type="checkbox"/>
Contact all casinos in the state	9/30/11	<input type="checkbox"/>
Ask for donation for foundation to help outreach to Indian veterans	10/30/12	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource

impacts, etc)

I continue to establish relationships with tribes

I have contacted leadership of I H S and Urban Healthcare – Will follow-up March 15-17, 2011

To discuss Partnerships MOU'S and funding for Outreach

I have been asked to join the Advisory Committee for IHS and Urban Health to establish MOU's

I have established relationships with 45 tribes in CA. Meeting set for 6/24/11 with VA IHS and Rural Health to discuss possible MOU for outreach

**California Department of Veterans Affairs
Business Plan
Plan of Action Worksheet**

Division: Native American Veterans Affairs

Strategy: Enhance leadership role to advocate for and provide benefits for Native Americans.

Objective Statement: Increase the percentage of Native American veterans in California who receive USDVA compensation and benefits to at least the California average by 2012-13.
Projected Date for Completing Objective: 2013
How will success/completion be determined (what are the metrics)? Increase in the percentage of Native American veterans in California who receive USDVA compensation and benefits to at least the California average by 2011-12, using 2010-11 as a baseline. Number of reintegration forms completed, identifying the veteran as Native American Establishing three TVR positions for CDVA.
Resources Needed (include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources).

Plan of Action Timeline Progress

What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
Establish a group of volunteers who can help Native Americans with veterans benefits claims.	Ongoing	<input checked="" type="checkbox"/>
Obtain funding for outreach	Ongoing	<input type="checkbox"/>
Find office space- in IHS Clinics & VA Hospitals & Private Non Profits	12/30/11	<input type="checkbox"/>
Look into grants	Ongoing	<input type="checkbox"/>
Establish a Tribal Veteran Representative (TVR) program for California	6/30/11	<input type="checkbox"/>
Find office space-in IHS clinics VA & Private Organizations	Ongoing	<input checked="" type="checkbox"/>
Attend VA Service Officer TRG	6/30/12	<input type="checkbox"/>
Attend Organization Meetings and Tribes	Ongoing	<input type="checkbox"/>
Find Funding	Ongoing	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

American Indian Veteran Association (AIVA) will provide Outreach Volunteers
 For all three areas of the State Northern, Central, and Southern California
 TVR's are awaiting training to become service officers from AmVets

The TVR Training is pending, the budget is needed for CalVet's VetRep Academy to certify our TVRs.

AIVA continues to take the lead with outreach to Indian Country in Northern, Central, and Southern CA.

**California Department of Veterans Affairs
Business Plan
Plan of Action Worksheet**

Division: Native American Veterans Affairs

Strategy: Enhance leadership role to advocate for and provide benefits for Native Americans

Objective Statement: Increase the benefits offered to fulfill California Native American Veterans' needs.
Projected Date for Completing Objective: Ongoing
How will success/completion be determined (what are the metrics)? Increase in the number of benefits offered to Native American Veterans in California Number of stories collected by the Warrior Project.
Resources Needed (include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources).

Plan of Action Timeline Progress

What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
Evaluate the needs of California Native American Veterans, which addresses veterans' current and future needs: e.g., health, housing, employment, education, psychological, spiritual, mental health, family, etc.	2012	<input type="checkbox"/>
Evaluate whether USDVA will cover Traditional Healing methods more widely used by the Native American community	2012	<input type="checkbox"/>
Establish a California Native American Veterans Cemetery	2013	<input type="checkbox"/>
Meet with Tribal members of the Yurok tribe	6/30/12	<input type="checkbox"/>
Meet with cemetery leadership CDVA and VA on grant procedures	6/30/12	<input type="checkbox"/>
Pick a site for the cemetery	9/30/11	<input type="checkbox"/>
Begin process for capital outlay planning	12/30/11	<input type="checkbox"/>
Visit all tribes in California	6/30/14	<input type="checkbox"/>
Visit Indian Organizations in California	Ongoing	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

I continue to evaluate the needs of California Native Veterans to increase the number of Benefits offered to California Native Veterans through outreach
I continue to research the possibility of a Native American Cemetery in California

I continue to gain the trust of CA tribes. This is needed to help evaluate the needs of the tribes. I continue to learn their history, their communication protocols, and rituals.

Tribal governments are culturally-based and stand on a foundation that may be centuries old, so my work is difficult.

Veterans Homes Division

STRATEGIC PLAN

PRIMARY GOAL

Provide measurable, high-quality long-term care and residential services in a fiscally responsible manner—to best meet the needs of the state's aged, disabled and homeless veterans.

Strategy # 1: Quality and Performance Improvement

Meet or Surpass all Licensing Requirements as Measured by Survey Success, High Resident Satisfaction and Five Star Quality Care

OBJECTIVES

1. Clinical Audit / analytic Program—part of Corporate Compliance Program
2. Standardize Quality Improvement Program and committee structure for all Homes by June 30, 2011
 - a. Quality Improvement / Performance Committee
 - b. Patient Care Policy Committee (Title 22 required)
 - c. Infection Control Committee (Title 22 required)
 - d. Pharmaceutical Services Committee (Title 22 required)
3. Improve resident centered care focus—monitor with resident satisfaction surveys
4. Align policy and procedures Homes-wide—completing key administrative and health care policies by June 30, 2013
5. Improve education / training content, delivery and validate results
6. Implement culture change to the PRIMARY GOAL of quality and fiscal responsibility
7. Standardize credentialing and medical / clinical practice guidelines
8. Improve HIPAA compliance for privacy and security
9. Implement Ew-VHIS and validate improvement in quality indicators
10. Develop Ew-VHIS phase II (to start immediately after the system is implemented) for ongoing system refinements that will improve quality and revenue

Strategy # 2: Financial Improvement

Offset 70% of Operating Expenses with Reimbursements and Reductions in OE&E by June 30, 2014 (currently 50% of expenses are offset by reimbursements)

OBJECTIVES

1. Improve reimbursements and savings by 7% per year
 - (a) Implement Corporate Compliance Program (required by 2013)
 - (i) Implement clinical-to-financial audit program
 - (ii) Improve documentation, MDS, RUGS, ICD-10 and other Coding, care plans—to maximize reimbursements

- (iii) Education and culture change for all employees in 150 job classifications
 - (b) Admissions—maximize census at all Homes
 - (c) Maximize Ew-VHIS function for reimbursements
 - (d) Increase 70% disability participation to 20% of licensed care census
 - (i) Strengthen veterans claims representation at all Homes
 - (e) Implement mandatory Medi-Cal spend-down, increasing VA A&A and pension
 - (f) Transition most RCFE to ICF to increase VA and Medi-Cal Per Diem
 - (g) Implement HFS recommendations and prior fiscal action plan
2. Reduce Operating Expense
- (f) Implement Medi-Cal and, or, VA formulary
 - (g) Standardize physician and nursing staffing and productivity and tie to resident acuity metrics
 - (h) Standardize Resident Benefit Plan
 - (i) Centralize and standardize pharmacy
 - (j) Align MWR Funds and activity expenses
 - (k) Centralize Procurement—develop a cost / benefit analysis and a proposal
 - (l) Monthly detailed review of all expenses by Administrators and Budgets

Strategy # 3: Programmatic Adaptation

OBJECTIVES

To support the Primary Goal of quality and financial improvement, and the VA's National Agenda, CDVA will pursue the following programmatic changes:

1. Increase admissions of veterans who are homeless and in hardship situations
2. Open new Homes
3. Complete a Master Plan for Yountville
4. Develop alternative property uses such as multi-family housing and collaborative programs that maximize underutilized spaces

Farm and Home Loan Division

California Department of Veterans Affairs
Strategic Goals Implementation Plan Worksheet

Division: Farm and Home Purchases

Managers responsible: George Flores, Ron Brand

Strategy: Improve Efficiency and Increase the Number of Loans to Veterans

Working Title: 1.0 Marketing

Objective Statement: Increase loan portfolio through marketing, turn times, and retention.

Projected Date for Completing Objective: June 2011

How will success/completion be determined (what are the metrics)?

Increase Awareness of the Program by maintaining and expanding marketing

Utilization of the program by veterans will increase by 10%

Industry partners will recommend CalVet Home Loans to their veterans clients

Resources Needed: As of June 1, 2011 there will be 6 pys and \$300,000

Plan of Action Timeline Progress

What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Continue the program of personal contacts through phone calls, and attendance and participating in industry and veterans events	Monthly	<input type="checkbox"/>
2) Continue to purchase, develop, distribute and publish advertisements in support of loan products	Monthly	<input type="checkbox"/>
3) Generate Free Media stories and press	Monthly	<input type="checkbox"/>
4) Utilize customer survey tool to improve awareness and customer service. Survey's to be used to provide feedback from all CalVet's customers. Customers include Veteran's, Brokers, Real Estate Agents and other agencies who can help promote the CalVet loan programs.	Ongoing	<input type="checkbox"/>
5) Monitor federal legislation regarding 25 year limit – HR 2319	Ongoing	<input type="checkbox"/>
6) Work with Veterans Services to educate veterans regarding the loan program	Ongoing	<input checked="" type="checkbox"/>
7) Design comparison chart for prospective borrowers comparing the loan programs along with traditional Conventional financing to highlight the benefits of our programs.	March 1, 2010	<input checked="" type="checkbox"/>
8) Contract backup printer for ongoing print needs not covered by State Printer. Documentation is critical to the mission of serving our customers. Printed information must be delivered in a timely manner when dealing with changes to our programs and guidelines. We need the ability to provide this documentation when the State Printer cannot meet our deadlines.	August 2011	<input type="checkbox"/>
9) Create and maintain databases of target markets/industry partners (Veterans, Realtors, Brokers and other Real Estate Professionals)	Ongoing	<input type="checkbox"/>
10) Reevaluate brokers currently certified	August 2011	<input type="checkbox"/>
11) Certify new brokers	October 2011	<input type="checkbox"/>
12) Continue to work with DRE/DOC	On-going	<input type="checkbox"/>
13) Create an oversight Marketing Committee	March 2011	<input checked="" type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q1: Media Program delayed until Department determines format.

Q3: 5) Legislation expired. This bill will be introduced again in the next legislative session.

Q4: 13) Marketing Committee being formed and initial kickoff meeting conducted in March 2011

**California Department of Veterans Affairs
Strategic Goals Implementation Plan Worksheet**

Division: Farm and Home Purchases

Managers responsible: George Flores, Ron Brand

Strategy: Improve Efficiency and Increase the Number of Loans to Veterans

Working Title: 2.0 Marketing Communication Systems

Objective Statement: Increase loan portfolio through marketing, turn times, and retention.

Projected Date for Completing Objective: December 2012

How will success/completion be determined (what are the metrics)?

Customer Phone System complete and operational

CalVet Loans website fully developed

Resources Needed: (include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources).

Plan of Action Timeline Progress

What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Revise and re-launch the Online application process	June 2011	<input type="checkbox"/>
2) Improve and launch the new CalVet Home Loan Website.	December 2011	<input type="checkbox"/>
3) Establish CalVet Loans URL address	December 2011	<input type="checkbox"/>
4) Set up a new CalVet Loan Only phone number	December 2011	<input type="checkbox"/>
5) Establish call back guidelines to insure 24hr resolution	November 2011	<input type="checkbox"/>
6) Integrate Online Customer Service help in-lieu of phone calls	December 2012	<input type="checkbox"/>
7) Implement a social media program	(delayed)	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q4: New Strategic Plan Goal

**California Department of Veterans Affairs
Strategic Goals Implementation Plan Worksheet**

Division: Farm and Home Purchases

Managers responsible: *George Flores, Gary Bonin, Rita Almanza, Linda Rose Gullion, Ron Brand*

Strategy: Improve Efficiency and Increase the Number of Loans to Veterans

Working Title: 3.0 Training and Procedure Development

Objective Statement: Increase loan portfolio through marketing, turn times, and retention.

Projected Date for Completing Objective: January 2011

How will success/completion be determined (what are the metrics)?

Standardization of current desk procedures that streamline processes

Develop process to monitor and review staff performance

Continue to centralize processes where efficiencies can be achieved.

Resources Needed: Currently certain staff members have been redirected from production to special projects to work on these objectives.

Plan of Action Timeline Progress

What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Train all staff in standardization processes	Ongoing	<input type="checkbox"/>
2) Create weekly reports for management and staff to monitor production and customer service. Implement weekly contact with customer.	October 2010	<input checked="" type="checkbox"/>
3) Develop standardize worksheets for Loan Processing Unit to standardize review process at each step in a file review.	December 2010	<input checked="" type="checkbox"/>
4) Standardize District Office and Central Loan Processing Unit desk procedures to processes to streamline and create efficiencies.	May 2011	<input checked="" type="checkbox"/>
5) Complete time study to develop policy on minimum standards for staff production	Feb 2012	<input type="checkbox"/>
6) Centralize Home Improvement Loans to Loan Processing Unit in Sacramento to improve quality and efficiency.	April 2011	<input checked="" type="checkbox"/>
7) Update and Standardize desk procedures for Home Improvement Loans	March 2011	<input checked="" type="checkbox"/>
8) Streamline technology updates. Develop monthly program for system updates to IT department. Updates to system to be rolled out prior to the following month. Create designated employees to submit and monitor the update process.	October 2012	<input type="checkbox"/>
9) Technology training on new processing system to be completed in phases. Beginning in Jan. 2011 Mitas to begin training user group, QC and Processing Managers on 2011 rollout. Original training and testing for new system to be provided by Mitas. Complete system rollout to all processing personnel to be completed by Jan. 2012. Trainers for 2012 rollout will be the testing user group, QC and processing Management.	January 2012	<input type="checkbox"/>

10) Standardized training on processing worksheets and procedure to be provided by Processing Managers. Training to begin with rollout of new worksheets for processing unit in Jan. 2011.	Ongoing	<input type="checkbox"/>
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Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

<p>Q2: 40% complete and on track to meet December goal. Goal moved out to May 2011 due to the reorganization roll-out for the district offices. Several offices are being closed and personnel reductions are being made. Time study goal being moved out to May 2011 to coincide with the standard procedures being complete in May 2011. 8) Mitas Automation Project and we are on track to complete this goal on or before completion date. 9) Mitas Automation Project is in process and currently on track for first phase of new processing system to be rolled out in Jan., 2011. 10) Worksheets being incorporated in new Mitas Processing System training will be on schedule when first phase is rolled out.</p> <p>Q3: Operations manual in process of being updated to include centralization of Home Improvement Loans to Sacramento Headquarters. Desk procedures being written and goal is to bring Home Improvement Loans into centralized process prior to current due date. 8) Mitas Automation Project On track to complete this goal on or before the completion date. 9) Mitas Automation Project New system first phase has been rolled out and is currently in the process of testing. Project still on track for full release in Jan. of 2012. 10) Worksheets training is scheduled during weekly processing meetings thru the month of Jan.</p> <p>Q Q4: 1) Training continues focusing on reports, follow-up and using Mitas comments. End Q4: 5) Date moved to February 2012 following implementation of new Mitas Processing System.</p>
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California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: *George Flores, District Office Managers*

Strategy: Improve Efficiency and Increase the Number of Loans to Veterans

Working Title: **4.0 District Office "In-Reach"**

Objective Statement: Increase loan portfolio through marketing, turn times, and retention.
Projected Date for Completing Objective: June 2012
How will success/completion be determined (what are the metrics)? <ul style="list-style-type: none"> • Retain Current Contract Holders • Increase number of Home Loans and Home Improvement loans in the portfolio • Loan portfolio will not drop below 10,000
Resources Needed: (include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources).

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Servicing staff to refer all deed and demand payoff requests to the District Offices	September 30, 2010	<input checked="" type="checkbox"/>
2) District Offices to develop marketing plan to reach out to current contract holders to sell ancillary products and the home improvement loans on a weekly basis.	January 2011	<input checked="" type="checkbox"/>
3) Develop training program to be delivered Statewide to all District Offices to sell the fiscal soundness of the program to encourage CalVet contract holders to remain with the program. (Portfolio retention)	On Hold	<input type="checkbox"/>
4) Research and establish ancillary products adding value to loan product by end of fiscal year 2011/2012	2011/2012	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

<p>Q3: District Offices will be reduced and closed. Plan is in place to contact all Veterans with loan pay-offs.</p> <p>3) Put on hold due to the District Office closings and reorganization in May of 2011.</p> <p>4) Research is continuing. Multi-unit housing is being explored along with partnerships with banking and mortgage brokerage companies.</p>

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: *Eric Tiche, Bond Manager*

Strategy: Improve Efficiency and Increase the Number of Loans to Veterans

Working Title: **5.0 Bond Finance and Investment**

Objective Statement: Maintain rates below market to increase loan portfolio
Projected Date for Completing Objective: Ongoing
How will success/completion be determined (what are the metrics)? <ul style="list-style-type: none"> • Successful bond sales at rates lower than outside market loan rates. • Warehousing of loans increases rate of return for monies not in new contracts vs. SMIF rate. • Outside funding opportunities increase loan funding availability. • New legislation improves overall program operations. • Revenue or GO bond ratings are increased.
Resources Needed: Currently there are two unfilled positions within Bond Finance will need to be hired and additional positions may be required for any new programs.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Review comparable sales	Weekly	<input type="checkbox"/>
2) Review Refunding opportunities	Monthly	<input type="checkbox"/>
3) Review new bond money issuance opportunities	Monthly	<input type="checkbox"/>
4) Provide data to rating agencies regarding portfolio/REO	Monthly	<input type="checkbox"/>
5) Maintain QMB reimbursement account funding	Monthly	<input type="checkbox"/>
6) Maintain QVMB reimbursement account funding	Monthly	<input type="checkbox"/>
7) Look into variable rate / swap opportunities	Quarterly	<input type="checkbox"/>
8) Update previous legislation	Semi-annually	<input type="checkbox"/>
9) Propose new legislation	Semi-annually	<input type="checkbox"/>
10) Perform rating agency presentations	Annually	<input type="checkbox"/>
11) Review outside liquidity provider opportunities	Semi-annually	<input checked="" type="checkbox"/>
12) Zero balance account legislation (GO payment method) AB2651	Fall 2010	<input checked="" type="checkbox"/>
13) Apply for PMIB loan	Fall 2011	<input type="checkbox"/>
14) Apply to CDLAC for Revenue funds	When needed	<input type="checkbox"/>
15) Program Operating Procedure Admin Expense Monitoring	Monthly	<input type="checkbox"/>
16) Revenue and GO bond ratings increase to AA+ / AAA respectively	June 2014	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q1: No opportunities for swaps at this time.
 Closed a bond sale on 6/29/10 including refunding and new money issuance
 Received ratings upgrades from two of the three ratings agencies and the third may issue an upgrade soon.
 Possible application to CDLAC in the Fall to go with other refunding opportunities.
 Q2: Applied to CDLAC for the November 17th 2010 meeting, requesting \$25,000,000 in allocation.
 Due to current budget crisis PMIB loan application has been pushed out to 2011.

Planned Rating Agency presentation in December 2010

Providing data in October 2010 to Rating Agencies regarding REO/Foreclosures

All Rating Agencies have now differentiated our Veterans GO bonds from the States GO bonds and have given corresponding upgrades to our ratings; AA S&P, Aa2 Moody's, and AA- Fitch.

Q3: Received CDLAC allocation for \$25,000,000. Deadline to issue has been extended due to market conditions. 10) Performed presentation to Rating Agencies in Q2.

Q4: Deadline to issue \$25,000,000 has been extended to June 2011. 9) Discussion and legislation has been proposed for Multi-Family program. 10) Continue to provide rating agencies data on REO/Foreclosures on a quarterly basis. 15) New POPs Admin Expense determined to be \$8.5 million for the next fiscal year down from previous FY \$15 million due to cash flow analysis.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: *George Flores, District Office Managers*

Strategy: Improve Efficiency and Increase the Number of Loans to Veterans

Working Title: **6.0 District Office Efficiency**

Objective Statement: Review District Office (DO) structure for volume/income stream to evaluate efficiencies.
Projected Date for Completing Objective: Spring 2011
How will success/completion be determined (what are the metrics)? <ul style="list-style-type: none"> Develop District Office Reports to Focus on gaps and training needs Relocate to District Office's Proper Locations to better serve Veteran populations
Resources Needed: (include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources).

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Develop comparison reports for all District Office's that consider the Veteran population in the DO's geographical area.	Monthly	<input type="checkbox"/>
2) Produce profitability reports for management review.	Monthly	<input type="checkbox"/>
3) Consolidate offices where feasible.	*	<input type="checkbox"/>
4) Move offices to areas with largest Veteran populations.	*	<input type="checkbox"/>
5) Require District Offices to provide weekly production and preapproval reports to the Supervising Property Agent in Sacramento.	February 2011	<input checked="" type="checkbox"/>
6) Right size office staffing. Reduce staffing to appropriate levels.	May 2011	<input checked="" type="checkbox"/>
7) Centralize management of district office. (Management for consistency to come from headquarters.)	May 2011	<input checked="" type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q2: * Office closures set for May 2011 with functions to be redirected to Headquarters.

Q3: 6) Reducing and reorganizing District Offices currently in process. On track to complete goal in May of 2011.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: *Eric Tiche, Bond Manager*

Strategy: Improve Efficiency and Increase the Number of Loans to Veterans

Working Title: **7.0 New Program Opportunities**

Objective Statement: Create additional loan programs to better serve California's veteran population by exploring the market for unique lending opportunities.

Projected Date for Completing Objective: June 2013

How will success/completion be determined (what are the metrics)?

- New loan programs in place
- Total loan portfolio increased across all programs

Resources Needed: Currently two unfilled position within Bond Finance will need to be hired and additional positions may be required for any new programs.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Develop Procedures for each program prior to implementation	Ongoing	<input type="checkbox"/>
2) Identify funding sources for different programs	Ongoing	<input type="checkbox"/>
3) Ensure appropriate legislation is enacted for appropriate programs	Ongoing	<input type="checkbox"/>
4) Outside loan Refinance capability — HR 2756 AB697 State AB 697 & Federal HR 834	December 2011	<input type="checkbox"/>
5) Schedule roundtable discussions with CalVet upper management to discuss new product review and analysis process. To include all options for new product development.	December 2011	<input checked="" type="checkbox"/>
6) Make contact and bring in subject matter experts to begin discussions on partnering with Industry Leaders for new product development.	March 2012	<input type="checkbox"/>
7) Home Equity Line of Credit product. Look into partnership with credit industry. (Create favorable terms for Veterans)	June 2012	<input type="checkbox"/>
8) Research a Reverse Mortgage product for Veterans. (Partner with reverse mortgage industry)	June 2012	<input type="checkbox"/>
9) Owner occupied 4-plex legislation – AB2087	December 2012	<input type="checkbox"/>
10) Auto Loans – Partner with Auto industry. (Create favorable terms for Veterans)	June 2013	<input type="checkbox"/>
11) Multifamily housing	June 2013	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q1: No progress in Washington on bill HR 2756

Q2: No new legislation until next session

3) Removed for redundancy

9) At Bond Counsel for review

Q3: 4) Legislation expired. We will reintroduce the bill this year. 9) AB 2087 Passed. Updated language required to reflect '74 Act.

Q4: 11) Created a new Strategic Goal specifically for multifamily housing. 4) Proposed additional legislation for refinance capability AB697.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: *Eric Tiche, Bond Manager*

Strategy: Improve Efficiency and Increase the Number of Loans to Veterans

Working Title: **8.0 Multifamily Housing**

Objective Statement: Create additional loan programs to better serve California's veteran population by exploring the market for unique lending opportunities.

Projected Date for Completing Objective: June 2013

How will success/completion be determined (what are the metrics)?

- Multifamily program in place
- Construction process started

Resources Needed: Upon completion new staff will be required to run the program.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Meet with Legislative staff to devise legislative proposal	May 2011	<input checked="" type="checkbox"/>
2) Pass legislation	Dec 2011	<input type="checkbox"/>
3) Identify donated land opportunities	Ongoing	<input type="checkbox"/>
4) Set up special fund	Jan 2012	<input type="checkbox"/>
5) Set up Multifamily program guidelines	April 2012	<input type="checkbox"/>
6) Obtain bond authority (possibly through CDLAC)	June 2012	<input type="checkbox"/>
7) Pass Resolution through new Finance Committee	Aug 2012	<input type="checkbox"/>
8) RFP process for contractors/operators	Nov 2012	<input type="checkbox"/>
9) Sell bonds	Jan 2013	<input type="checkbox"/>
10) Break ground on new construction	Jun 2014	<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q4: New Strategic Goal Added. 1) Conducted initial meetings with legislative staff in March 2011

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: *Eric Tiche, Bond Manager*

Strategy: Improve Efficiency and Increase the Number of Loans to Veterans

Working Title: **9.0 Co-Operative Housing**

Objective Statement: Create additional loan programs to better serve California's veteran population by exploring the market for unique lending opportunities.

Projected Date for Completing Objective: June 2013

How will success/completion be determined (what are the metrics)?

- Co-Op program in place
- Construction process started

Resources Needed: Upon completion new staff will be required to run the program.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Meet with Legislative staff to devise legislative proposal	June 2011	<input checked="" type="checkbox"/>
2) Pass legislation	Dec 2011	<input type="checkbox"/>
3) Identify donated land opportunities	Ongoing	<input type="checkbox"/>
5) Set up Co-Op program guidelines	April 2012	<input type="checkbox"/>
6) Pass Resolution if needed	Aug 2012	<input type="checkbox"/>
7) RFP process for contractors/operators	Nov 2012	<input type="checkbox"/>
8) Sell bonds	Jan 2013	<input type="checkbox"/>
9) Break ground on new construction	Jun 2014	<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q4: New Strategic Goal Added. 1) Conducted initial meetings with legislative staff in June 2011

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: Farm and Home Purchases

Managers responsible: George Flores, District Office Managers

Strategy: Manage the program in a fiscally responsible manner

Working Title: 10.0 Right Size Division

Objective Statement: Manage Operational and Administrative Expenses to make District Offices, Farm and Home Division, and support units more cost effective.

Projected Date for Completing Objective: December 31, 2011

How will success/completion be determined (what are the metrics)?

- Restructure the District Offices so they are More Cost Effective
- Staff will be appropriate to service loan needs of veterans population of that District
- Farm and Home Division Units are adequately "Right Sized".
- Farm and Home Support Units are adequately "Right Sized".

Resources Needed: Redirect part time of Supervising Property Agent

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Hire marketing field representatives with experience in lending for work with District Offices.	(on hold)	<input type="checkbox"/>
2) Consider the use of Permanent Intermittent Time Staff at District Offices.	June 30, 2010	<input checked="" type="checkbox"/>
3) Outline specific requirements for production output as part of job requirement at each District Office.	*	<input type="checkbox"/>
4) Build reporting to monitor workflow to ensure appropriate time usage for each function within Farm and Home Division. (Multi-fund positions)	August 2011	<input type="checkbox"/>
5) Develop a formal staff share plan between Headquarters Units to cover critical functions when production is high to reduce need for extra staff inside Farm and Home Division.	August 2011	<input type="checkbox"/>
6) Create work flow analysis evaluation for each unit.	August 2011	<input type="checkbox"/>
7) Obtain complete District Office evaluations of staffing and experience levels to determine what offices and staff can support the centralized processing unit in times of high volume.	*	<input type="checkbox"/>
8) Draft evaluation report outlining staffing levels and work flow based on evaluations.	Fall 2011	<input type="checkbox"/>
9) Submit final evaluation report to Finance Steering Committee for consideration and review.	December 31, 2011	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q1: Use of Permanent Part Time Staff was deemed not feasible.
 Q2: * Office closures set for May 2011 with functions to be redirected to Headquarters.
 Q3: 4) Work tracking reports have been developed and programmed into MITAS. 5) Cross training of staff in different units is underway. 8) Staff levels for LPU have been developed and will be implemented next month.
 End Q4: District Office staff meeting being held at headquarters June 29th & 30th to develop District Office staff responsibilities and expectations. Workflows to be developed through this and subsequent meetings in the first quarter. Dates moved to August of 2011 to finalize the workflows.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: Rita Almanza, Linda Rose Gullion

Strategy: **Manage the program in a fiscally responsible manner**

Working Title: 11.0 REO/Foreclosure

Objective Statement: Reduce and control delinquencies and foreclosure inventory to levels below FHA, and at par with VA.
Projected Date for Completing Objective: Ongoing
How will success/completion be determined (what are the metrics)? <ul style="list-style-type: none"> Each quarter, compare the CalVet 30, 60 and 90 day lates and foreclosure/REO inventory against the data provided in the National Delinquency Survey provided quarterly by the Mortgage Bankers Association. Maintain delinquencies and foreclosure/REO inventory levels below FHA and at par with VA 9 out of 12 months rolling.
Resources Needed: Current Farm & Home staff was being redirected to the Collection Unit to assist with the workload.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
1) Maintain staffing levels at one Property Agent for every 90 accounts delinquent 60 days or more and one Property Agent for every 45 accounts in foreclosure/REO inventory. Also maintain Program Technicians at a level of one for every two Property Agents.	Ongoing	<input type="checkbox"/>
2) Develop a principal modification program for highest risk borrowers. This plan of action is terminated in favor of item 6 below.	Discontinued	<input type="checkbox"/>
3) Integrate the VA HAMP program for the benefit of CalVet contract holders. This plan of action is terminated in favor of item 6 below.	Discontinued	<input type="checkbox"/>
4) Enhance the 30 day delinquency call plan	November 1, 2010	<input checked="" type="checkbox"/>
5) Update Title 12 to eliminate the need for a newspaper advertisement and modify the bid period to decrease REO holding time.	January 1, 2011	<input checked="" type="checkbox"/>
6) Obtain funds form the Hardest Hit Fund administered by CalHFA for the benefit of CalVet borrowers and the F&H program.	December 1, 2010	<input checked="" type="checkbox"/>
7) Submit Radian insured REOs to Radian for reimbursement of losses.	January 1, 2011	<input checked="" type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

<p>Q2: Staffing levels for the foreclosure units are coming into line as the number of delinquent accounts is reduced through collection activity.</p> <p>In July, the California Housing Finance Agency was approved to receive \$700 million dollars of homeowner assistance from the US Treasury. The program as laid out will be superior to any other programs now available. As such, the in house modification program and the VA HAMP programs have been sidelined until we can exhaust the benefits of the HHF.</p> <p>The 30 day call plan is performing well and all changes have been implemented.</p> <p>Q3: 1-19-11: The 30 day call plan was left operating as is due to the approaching office closures</p> <p>Title 12 is being updated and sent to legal to review</p> <p>Keep Your Home California is online as of 1-10-11 and additional programs roll out 2-6-11. 7) The department has reached the deductible and can now submit losses for Radian insured loans.</p>

Q4: Staffing levels are under review as the Collection manager vacated the position as of Feb. 14, 2011. The numbers allocated above may need to be increased as delinquencies have been higher than VA for 9 quarters but lower than FHA. Foreclosure rates has been lower than FHA, however CalVet was slightly higher than VA as of the last quarter, Dec. 2010,

4) The 30 Day Call Plan is under review as the District Offices are closing and this function will be redirected to the Collection Unit staff. Current Farm & Home staff will be redirected to the unit to assist with the 30 Day calls by May 2011.

5) Title 12 changes were delivered to the Legal Office for review and implementation.

6) The "Keep Your Home California" program is in full swing and we have just begun to see quantifiable results. As of 4/6/2011, we have 176 contract holders in the pre-approval process, 13 have been approved for program assistance and eight that have already received program assistance funds. We anticipate that these numbers will continue to increase which will have a positive impact on our delinquency numbers and REO losses.

7). We have begun to file Radian claims on our REO and Short Sale losses. We have 19 claims filed and two already approved for claim payments in April.

End Q4: 4) The District Offices are closed. Current Farm & Home staff redirected to Collections are handling the 30 Day calls effective May 2011.

5) Title 12 changes were delivered to the Legal Office for review and implementation.

6) The "Keep Your Home California" program is in full swing and we have just begun to see quantifiable results. As of 5/31/2011, we have 123 contract holders in the pre-approval process, 27 have been approved for program assistance

7) We are working with the Insurance Unit and our Legal Dept. to confirm figures for the deductible and. for claim payments

California Department of Veterans Affairs

Strategic Goals Implementation Plan Worksheet

Division: Farm and Home Purchases

Managers responsible: *Glen Rimbey, George Flores, Rita Almanza*

Strategy: Manage the program in a fiscally responsible manner

Working Title: 12.0 FHA Approval

Objective Statement: Obtain FHA approval and begin issuance of FHA backed mortgages
Projected Date for Completing Objective: Winter 2014
How will success/completion be determined (what are the metrics)? <ul style="list-style-type: none"> • CalVet offers FHA loan products to borrowers. • Issuance of FHA CHUMS ID to CalVet Underwriters. • Address borrower benefit issues in using FHA, VA, and CalVet Home Loans • Establish program with industry partners to offer flexible pricing and compensation for CALVET programs. • CalVet enters into the Direct Endorsement Pre-Closing Test Case process to obtain full and unconditional DE Approval
Resources Needed: None needed at this time.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Modify process and procedures based upon FHA Santa Ana HOC loan review findings	Ongoing	<input type="checkbox"/>
2) FHA introductory training (3 day class) from Santa Ana Homeownership center	June 2010	<input checked="" type="checkbox"/>
3) FHA approval of CalVet Contract of Sale	Fall 2011	<input type="checkbox"/>
4) Identify FHA underwriter, processor and closer candidates	Fall 2011	<input type="checkbox"/>
5) Obtain FHA underwriter, processor and closer training for candidates	Winter 2011/12	<input type="checkbox"/>
6) Obtain FHA CHUMS ID for FHA underwriting staff	Winter 2011/12	<input type="checkbox"/>
7) Begin 50 test case process for automatic approval status	Spring 2012	<input type="checkbox"/>
8) Begin marketing FHA program to industry partners	Spring 2012	<input type="checkbox"/>
9) Transition CV97 to a portfolio product used by exception or for business-based decisions	Fall 2011	<input type="checkbox"/>
10) Restructure main product offerings to FHA, VA, CalVet 80/20	Fall 2011	<input type="checkbox"/>
11) Create an FHA team to originate, process, underwrite and ship pre-closing packages	Winter 2011	<input type="checkbox"/>
12) Establish process and procedures within the division	Winter 2011	<input type="checkbox"/>
13) Complete required number of approved Pre-Closing Test Cases	2011/2012	<input type="checkbox"/>
14) Establish incentive program similar to a servicing-release premium or yield spread premium.	Winter 2014	<input type="checkbox"/>
15) Establish a rotation list of preferred partners on CalVet website.	Winter 2014	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q1: Item 2 is going to be dropped, since the Feds have no budget for this training.
 Item 3: the response from our Law Division to FHA is complete and will hopefully be sent this week.
 Q2: 3) Mailed response from our Law Division to FHA August 2010. FHA is still denying our request. Once we get the appropriate response, we will be strategizing on our next plan to accomplish FHA's approval.
 Q3: Received FHA letter denying our use of the Contract of Sale.
 Q4: We have put the FHA approval process on hold as the market interest rates have increased and our

loan rates have decreased. FHA funding may not be necessary for the program to rebound.
End Q4: FHA approval is still pending due to pushback from HUD/FHA. It is now out of our control and dependant on our consultants and our Law Division. Ultimately, this pushback has caused additional items on this list to be delayed.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: *Glen Rimbey, Janet Iwata*

Strategy: Manage the program in a fiscally responsible manner

Working Title: 13.0 Regulation and Legal Compliance

Objective Statement: Ensure compliance with Federal, State and Local Laws related to loan production
Projected Date for Completing Objective: Ongoing
How will success/completion be determined (what are the metrics)? <ul style="list-style-type: none"> Issuance of periodic reports to Senior Management. On going credit policy communication throughout the Division Implementation of targeted training Successful registration in NMLS for SAFE Act Licensing Requirements Implementation of additional loan programs.
Resources Needed: <i>We have 2 py's for this function. Due to reduction of total staffing the staff have been redirected to other priority work.</i>

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Starting January 1, 2011, Monitor portfolio performance and loan activity trends then adjust credit policy to mitigate unnecessary risk.	Ongoing	<input checked="" type="checkbox"/>
2) Design a targeted course plan for staff. Will establish once we have a list of employees that passed the SAFE Licensing Test. Target date Jan. 1, 2011	Ongoing	<input checked="" type="checkbox"/>
3) Continue information sessions to provide exposure to potential SAFE Act testing topics.	Completed	<input checked="" type="checkbox"/>
4) Identify and schedule appropriate personnel to SAFE Act educational requirements. Need results of SAFE Test, target date Jan. 1, 2011	Ongoing	<input checked="" type="checkbox"/>
5) Continually enhance the targeted training plan.	Ongoing	<input type="checkbox"/>
6) Explore information training session as needed for potential new CalVet Loan programs.	Ongoing	<input type="checkbox"/>
7) Review regulatory and industry guidelines to suggest, receive and manage program changes in the QC Unit.	Ongoing	<input type="checkbox"/>
8) Implement procedures to communicate credit policy and revisions as needed.	August 2011	<input type="checkbox"/>
9) Quality Control to establish a schedule for ongoing Safe Act continuing education requirements. Schedule to include new hires required to be licensed in processing departments.	June 2011	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q1: QC team is reviewing business processes and procedures as well as conducting trial loan reviews. The updated training plan has been approved by Jim, and was forwarded to Personnel.

Q2: Item #7 completion date changed to allow time to explore possible contracting with RE Compliance Company to help identify necessary changes to Dept. loan processing procedures to meet new Federal regulations.

Item #8 Completion date changed as we are in process of development Dept. Credit policies.

Q3: Item #7 Met with managers to discuss changes in procedures and practices to meet regulations and

industry practices, issue Field Office Directives to inform staff of changes, provide in house training.

Item #9 in process of working with DOC to meet SAFE Licensing Requirements and establish education requirements

Q4: #1) Based on trail reviews personnel moves taking place then QC to re-evaluate portfolio performance.

#2) AllRegs training has been established for LPU, QC to work with other unit managers to identify training needs for their units

End Q4: The Quality Control Unit has been disbanded due to revised priorities. Tracking status controls moved to rollout in 1st quarter of 2011 to coincide with the release of the new processing system. Reporting to be developed and monitored in the new system.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: George Flores, Rita Almanza, Glen Rimbey, Janet Iwata, Gary Bonin, Linda Rose-Gullion

Strategy: Manage the program in a fiscally responsible manner

Working Title: 14.0 Document and Data Compliance

Objective Statement: Ensure compliance with Federal, State and Local Laws related to loan production
Projected Date for Completing Objective: Spring 2012 – Updates Ongoing
How will success/completion be determined (what are the metrics)?
<ul style="list-style-type: none"> Data integrity and forms within MITAS are compliant with laws and regulations
Resources Needed: Currently certain staff members have been redirected from production to special projects to work on these objectives.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Establish document controls to ensure usage of current version of disclosures, forms and documents. Monitor compliance through Quality Control Unit.	Winter 2010 & ongoing	<input checked="" type="checkbox"/>
2) Establish tracking status controls to ensure accuracy of system data. Monitor compliance through Quality Control Unit.	Q1 2012 & ongoing	<input type="checkbox"/>
3) Establish data integrity controls to ensure adequacy and accuracy of system data. Monitor compliance through Quality Control Unit.	Q1 2012 & ongoing	<input type="checkbox"/>
4) Program functionality into the software to automate audit of compliance-related processes	Spring 2012 & ongoing	<input type="checkbox"/>
5) Develop system management tools to monitor production, audit compliance-related processes and customer service.	Spring 2012	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q1: Mitas improvements in process.
 Q3: LOS system is in development and testing phases. Harlan documents have been integrated into the new LOS system to insure that disclosure forms are in compliance with disclosure laws.
 Q4: LOS system work continues. Testing and functionality are being worked on.
 End Q4: The Quality Control Unit has been disbanded due to revised priorities. Tracking status controls moved to rollout in 1st quarter of 2011 to coincide with the release of the new processing system. Reporting to be developed and monitored in the new system.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: *Glen Rimbey, Janet Iwata*

Strategy: **Manage the program in a fiscally responsible manner**

Working Title: 15.0 Contracts and Consultants

Objective Statement: Ensure that we are monitoring the use of consultants/contractors
Projected Date for Completing Objective: Ongoing
How will success/completion be determined (what are the metrics)? <ul style="list-style-type: none"> Complete a list the consultants/contractor with the date their contracts expire, with extensions Start RFPs early – sufficient time for all approvals Establish contract evaluation criteria
Resources Needed: Will need to hire to fill a position.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Review the list confirming end of contracts – possible extensions	Monthly	<input checked="" type="checkbox"/>
2) Prepare a list of Consultants with expiration dates	Annually	<input checked="" type="checkbox"/>
3) Evaluation contractual compliance	Annually	<input type="checkbox"/>
4) Prepare Contract Evaluation criteria	December 2011	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q1: Tracking list of our current contractors is completed. We are in the process of establishing evaluation criteria for each of our contractors.
 Q3: Project is on hold. Individual contract managers are reviewing each contract for common criteria.
 Q4: Started preparing the insurance broker contract.
 End Q4: We are in the processing of evaluating our major contract for claims adjusting.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: **All Managers**

Strategy: **Improve Overall Customer and Support Services**

Working Title: **16.0 Operations and Desk Procedure Manuals**

Objective Statement: Update and centralize governing documents including desk procedures, Operations manuals and all other instructional documents.
Projected Date for Completing Objective: April 2011
How will success/completion be determined (what are the metrics)? <ul style="list-style-type: none"> Existence of electronics documents in place available to staff and managers along with a process to update regularly.
Resources Needed: Currently certain staff members have been redirected from production to special projects to work on these objectives.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Ensure accuracy of Application Package Process, Forms and Documents found on the CV website in conjunction with Mitas.	July 2012	<input type="checkbox"/>
2) Partner with Documentation Preparation Company to produce standard lending industry documents with compliance support to insure accuracy of lending documentation. (Under contract with Harland documentation company to provide standard industry documents.)	December 2010	<input checked="" type="checkbox"/>
3) Ensure updated Operations/Desk Procedure Manual drafts delivered for review.	Q2 11/12	<input type="checkbox"/>
4) Management approval of revised Operations/Desk Procedure Manual	Q3 11/12	<input type="checkbox"/>
5) Management to ensure staff uses modified Operations Manual	Q3 11/12	<input type="checkbox"/>
6) Designate a Farm and Home employee responsible to maintain all Desk Procedures/Operations Manual in a central repository and manage subsequent updates. Location to be determined and acquired by Quality Control Unit.	Q4 11/12	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

<p>Q1: Selected firm to provide e-docs.</p> <p>Q3: Harlan documents have been integrated into the new LOS system to insure that disclosure forms are in compliance with disclosure laws.</p> <p>End Q4: 1) Marketing Committee is updating the application package on the Internet. First phase of updating internet application and forms to be rolled out in July 2012.</p> <p>3-6) Date adjustments related to district office closure and redirecting of staffing. Manual updates ongoing.</p>
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California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: *Glen Rimbey, Janet Iwata*

Strategy: **Improve Overall Customer and Support Services**

Working Title: 17.0 Staff Training and Development

Objective Statement: Establish a revised training plan and scheduled training sessions in order to have a well trained staff that can make loans and deliver the appropriate service to our Veterans.

Projected Date for Completing Objective: December 2011 – Continuing Annually

How will success/completion be determined (what are the metrics)?

- Establish a training plan
- Establish group events to transfer knowledge from each section
- Cross train divisions, depending on needs

Resources Needed: No new resources needed.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Assess the needs for training – compliance (To be established by QC Unit monthly audits which will identify gaps to establish training needs.)	March 2011 (then annually)	<input checked="" type="checkbox"/>
2) Establish the appropriate training to fill the needs	July 2011 (then annually)	<input checked="" type="checkbox"/>
3) Assess the needs for cross training	July 2011	<input checked="" type="checkbox"/>
4) Establish possible cross training plan	Dec 2011	<input checked="" type="checkbox"/>
5) Define Customer Service Philosophy for the Division	Jan 2011	<input checked="" type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q1: Cross training in process with four additional staff in the Escrow Unit.
All-Regs training in process.
The contract for 20 hours of SAFE training is in the process.
Most of the training needs will be in order to keep CalVet compliant with Federal Regulations. We have staff in the Quality Control Unit monitoring federal legislation.
Q3: Item #5 Submitted draft of Customer Service Philosophy for review.
Q4: #3 Management will now be rotating staff from LPU to Collection/Foreclosure and Customer Service for cross training. #5 CS Philosophy has been approved.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: Rita Almanza, George Flores

Strategy: Improve overall customer and support services

Working Title: 18.0 Automation and Technology

Objective Statement: Enhance services to our customers through automation and technology
Projected Date for Completing Objective: Spring 2013
How will success/completion be determined (what are the metrics)? <ul style="list-style-type: none"> New MITAS Origination System developed with F&H staff Expand EFT Program to allow for more flexibility with loan payments Offer additional loan payment options over the telephone and internet Implement processes and procedures to place 11,000 existing paper files and all new loan files into electronic imaging accessible from desktop PCs. Revisit services of a tax servicing agency to process tax payments to the counties
Resources Needed: Staff has been redirected to assist with the imaging project, others mentioned below either require RFP and/or cost analysis

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
1) Provide ongoing training for current and new users	Ongoing	<input type="checkbox"/>
2) Determine staffing, products required and process to implement imaging project.	Apr 2010	<input checked="" type="checkbox"/>
3) Begin imaging of existing portfolio files and Pre-Approval documents	August 2011	<input type="checkbox"/>
4) Gather information from vendors offering telephone and internet payment services	Sept 2011	<input type="checkbox"/>
5) Establish a super-user group across HQ Units to provide feedback for improvements and implementation of updated processes	Oct 2011	<input type="checkbox"/>
6) Begin imaging of new loan documents	August 2011	<input type="checkbox"/>
7) Work with ISD and Accounting to develop standards for potential vendors	Sept 2011	<input type="checkbox"/>
8) Begin RFP process	Sept 2011	<input type="checkbox"/>
9) Determine if tax servicing services is cost effective	Sept 2011	<input type="checkbox"/>
10) Identify ISD support functions needed solely within the division	Fall 2011	<input type="checkbox"/>
11) Work with ISD and Accounting to establish process to expand EFT program	Oct 2011	<input checked="" type="checkbox"/>
12) Implement ISD support functions as identified	Winter 2012	<input type="checkbox"/>
13) Develop a new MITAS Loan Origination System working with MITAS and Farm and Home personnel	Spring 2013	<input type="checkbox"/>
14) Move dedicated ISD personnel to the second floor	Spring 2013	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q1: User group delayed, implementation estimated for October 2010.
 Q2: Items 2 & 3 -Imaging equipment selected and service request for purchase submitted. Imaging of existing portfolio files will be delayed until November 2010 due to purchase order process.
 Item 11 –Per ISD, another EFT withdrawal process is not feasible at this time due to interference with other reporting and processes. Additionally, it would not be cost effective unless there were a substantial number of accounts.
 MITAS Loan Origination System development in process
 Q3: Items 3-8 -Scanners purchased and received. Imaging of existing portfolio files starting shortly.

Q4: 4,7,8 & 9 Delayed until September 2011 due to priority of other processes

2, 3 & 6 -Imaging equipment received. Imaging project delayed due to priority of other processes. There were problems with the imaging software to be used.

End Q4: Items 3-8 - ISD working on software programming issues between the scanner and Mitas.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: Rita Almanza, George Flores

Strategy: Improve overall customer service and support services

Working Title: 19.0 Automated Underwriting, E-Notary, and Creditors Rights

Objective Statement: Enhance services to our customers through automation and technology
Projected Date for Completing Objective: Winter 2014
How will success/completion be determined (what are the metrics)? <ul style="list-style-type: none"> Established plan for automated underwriting and processing system. Improved application to funding turn-times Establish a contract with a private law firm to provide unlawful detainers, relief from bankruptcy and other department legal needs when time constraints prevent or restrict in-house assistance. Electronic notary policies and procedures in place and operational
Resources Needed: Currently certain staff members have been redirected from production to special projects to work on these objectives. When implemented, hardware and software cost will be offset by the reduction in overnight courier costs spent to ship loan documents.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Monitor Secretary of State legislation and website for updates regarding e-notary within CA	Ongoing	<input type="checkbox"/>
2) Establish subject matter expert team to work closely with vendor and IT department to establish requirements for system for automated underwriting and processing system	May 31, 2010	<input checked="" type="checkbox"/>
3) Develop a cost benefit analysis of a creditors rights attorney and submit to Sr. management for review. Cost benefit analysis complete. Working on setting up process and investigating contract.	January 1, 2011	<input checked="" type="checkbox"/>
4) If the proposal for a creditors rights attorney is approved, develop an action plan to implement	Discontinued	<input type="checkbox"/>
5) Begin RFP process for automated underwriting and processing system	January 31st, 2011	<input checked="" type="checkbox"/>
6) Establish process and procedures with ISD and Accounting for automated underwriting and processing system	October 2011	<input type="checkbox"/>
7) Establish process and procedures with Farm and Home for automated underwriting and processing system	October 2011	<input type="checkbox"/>
8) Research e-notary hardware and software requirements	Winter 2013	<input type="checkbox"/>
9) Partner with ISD and ISO to determine feasibility of e-notary	Winter 2013	<input type="checkbox"/>
10) Establish process and procedure for Farm and Home that includes electronic mail document delivery upon e-notary availability	Winter 2014	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q1: Underwriting and processing system will not be bid out as we are working with a current contractor, MITAS with these issues.
 Q3: 4)1-18-11: Plan was abandoned in lieu of working closer with legal to develop a tighter process. Plan may be revisited later depending on the success or failure of this.
 Q4: The new MITAS system will have this functionality.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: Rita Almanza, Linda Rose Gullion

Strategy: Improve overall customer service and support services

Working Title: 20.0 E-Fax and Electronic Funds Transfer

Objective Statement: Enhance services to our customers through automation and technology including capability to transfer funds and modernization of incoming fax service.

Projected Date for Completing Objective: Summer 2013

How will success/completion be determined (what are the metrics)?

- Electronic funding capability available for 80%
- E-Fax server in place to allow agents and other staff to receive incoming faxes and distribute to electronic imaging system..

Resources Needed: Currently certain staff members have been redirected from production to special projects to work on these objectives. The cost to fund electronically can be offset with the cost reduction of shipping the check by overnight courier. A nominal wire fee could be collected from the veteran at closing if necessary.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Monitor update to Vendor database (Accounting Module) to include wiring information as needed	Ongoing	<input type="checkbox"/>
2) Monitor Accounting Unit's readiness to process same day settlements	Ongoing	<input type="checkbox"/>
3) Develop research team to research e-fax delivery systems	January, 2011	<input checked="" type="checkbox"/>
4) Determine available processes with Controller and Department of Finance	Spring 2011	<input checked="" type="checkbox"/>
5) Identify need for legislation or establish existing authority as adequate	Spring 2012	<input type="checkbox"/>
6) Research 5 to 6 e-fax delivery systems and get RFP's on 3.	July 1st, 2012	<input type="checkbox"/>
7) Research need for a new process for CV working closely with the Department of Finance to authorize same-day settlement methodology	Summer 2012	<input type="checkbox"/>
8) Install and train staff on chosen e-fax system	January, 2013	<input type="checkbox"/>
9) Commence electronic funds transfer	Summer 2013	<input type="checkbox"/>
10) Establish an appropriate account to issue same-day settlement electronic funds transfers	Winter 2013	<input type="checkbox"/>
11) Establish process and procedures within the Escrow Unit	Winter 2013	<input type="checkbox"/>
12) Obtain wiring information and then update Title – Escrow Holder databases (Origination Module)	Winter 2013 & ongoing	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q2: Metrics section - Deleted "and 50% of payoffs" as the Treasurer's Office is not currently willing to receive incoming EFT payments on our behalf.
 4) Determined Controller and Finance processes are not feasible. Working with State Treasurer's Office to develop and test wire funds process.
 12) Wiring information gathering in process.
 Q3: STO has agreed to provide services for out going EFTs.
 Q4: 12) Procedure developed to proactively provide Title and Escrow information in the loan processing stage. Procedure developed for Loan Processing Unit to provide Closing Unit with title and escrow information upfront to begin the closing database for wiring and closing agent approvals.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: **Rita Almanza, George Flores, Glen Rimbey**

Strategy: **Improved staff effectiveness**

Working Title: **21.0 Update Job Classifications**

Objective Statement: Objective: Update job classifications to better reflect responsibility levels and pay levels-match compare to Department of Housing & Community Development (HCD) and California Housing Finance Agency (CalHFA).

Projected Date for Completing: June 30, 2011

How will success/completion be determined (what are the metrics)?

- Partner with our Human Resources Department (HR) and the Secretary/Under Secretary to interact with the Department of Personnel Administration (DPA).
- Investigate existing classification models.

Resources Needed: F&H Managers, CDVA Human Resource and DPA staff needed to complete this objective.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Adopt a Principal Property Agent classification as program level management (currently Supervising PAs).	December 2011	<input type="checkbox"/>
2) Modify Supervising Property Agent classification level to unit managers (currently Senior PAs).	December 2011	<input type="checkbox"/>
3) Modify Senior Property Agent to a non-supervisory classification similar to HCD/CalHFA to establish appropriate compensation for lead agent or special projects position.	December 2011	<input type="checkbox"/>
4) Adopt Finance Assistant, Associate, Specialist, Officer classification series for Bond Finance and Investment Unit (from CalHFA).	December 2011	<input type="checkbox"/>
5) Designate HR and F&H liaison to assure progress and provide status from both arenas.	June 30, 2011	<input type="checkbox"/>
6) Schedule regular meetings with the Secretary/Under Secretary to update status.	June 30, 2011	<input type="checkbox"/>
7) Establish a team of subject matter experts from Farm & Home Purchases to update the classification Specifications and Minimum Qualifications.	June 30, 2011	<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q1: Waiting for HR to give information on classifications.
 Q2: Budgetary Issues, including issues surrounding our own Human Resources Division and the Department of Personnel Administration continue to plague any classification changes.
 Q3: 1 – 3) HR stated that upgrades can not be done. 4) These positions are currently not being filled.
 Q4: Letter from CHP requesting CalVet's participation in classification change. HR notified and requesting information from Farm & Home.
 End Q4: 5) Participating with I-Bank to revise the Loan Officer Classification in response to the requirement to become a licensed mortgage loan officer. Several staff are conducting desk audits.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: **Farm and Home Purchases**

Managers responsible: **All Managers**

Strategy: **Improved staff effectiveness**

Working Title: **22.0 Staffing Needs**

Objective Statement: CalVet staffing will be based on financial justification and business needs based on volume in each unit. Develop a program to set unit staffing based on actual documented needs.

Projected Date for Completing Objective: Fall 2011

How will success/completion be determined (what are the metrics)?

- Develop detailed staffing needs assessments to determine proper staffing levels in each unit based on number of accounts, number of loans being made, number of delinquencies, etc.
- Quarterly adjustments made by Division Chief based on volume, inventory, along with sound judgment.

Resources Needed: Current Staff needed to do workload analysis

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Assess present and future staffing needs in each unit	June 2011	<input type="checkbox"/>
2) Determine critical metrics in each unit that will determine staffing levels	June 2011	<input type="checkbox"/>
3) Publish staffing criteria and establish methods to transition staff as economic measures change	March 2011	<input type="checkbox"/>
4) Conduct management reviews and adjust staffing as needed	Quarterly after March 2011	<input type="checkbox"/>
5) Build ISD reporting to represent changes in the business and staffing status	Fall 2011	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q1: Staffing reviews in progress.

Staffing Metrics being established.

Q3: Current staffing to be adjusted based on District Office closures and staff reductions in May 2011.

Metrics have been developed in LPU. Housing industry is slow.

Q4: 1 and 2 Objective timeline adjusted for consideration after District Office closures and current work processes are reallocated.

California Department of Veterans Affairs Strategic Goals Implementation Plan Worksheet

Division: Farm and Home Purchases

Managers responsible: Rita Almanza, George Flores, Glen Rimbey, Eric Tiche

Strategy: Improved staff effectiveness

Working Title: 23.0 Hiring

Objective Statement: Select candidates more qualified with experience in the lending industry.
Projected Date for Completing Objective: January 31 st , 2011
How will success/completion be determined (what are the metrics)? <ul style="list-style-type: none"> New hires showing specific experience in the area of lending.
Resources Needed: Budget for hiring needed.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
1) Develop detail plans for hiring staff with specific lending industry experience.	November 30th, 2010 (on hold)	<input type="checkbox"/>
2) Create employment team to review and update exams and interview questions to meet requirement of hiring experienced technicians and agents for Farm and Home.	May 31st, 2010 (on hold)	<input type="checkbox"/>
3) Employment team to identify potential retirement trends to establish hiring needs.	January 1st, 2011 (on hold)	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Q1: On hold due to review of POP's budget.
 Q3: Hiring is not contemplated at this time
 End Q4: The current hiring freeze has put this issue on hold.

Administration and Support Divisions

Legislation and Communications Division California Department of Veterans Affairs Business Plan Plan of Action Worksheet

Division: Legislation Office

Strategy: Provide exceptional advice, guidance and advocacy when developing legislative proposals, responding to legislative and congressional inquiries, and educating legislative and congressional staffers and members.

<p>Objective 4.1: Ensure the policy objectives of the department are met through legislative and congressional action</p> <p>How we'll get there: Through legislative advocacy, education and communication provide members of the Legislature and Congress with information about the department and its main policy objectives which lead to successful implementation of positive legislative proposals.</p>
<p>Projected Date for Achieving the Objective: There are specific deadlines for legislation to be passed by each house of the state Legislature and Congress so our deadlines for input and action are determined by those calendars.</p>
<p>Performance Measure – The success of our efforts will be measured by the number of proposals that are passed by the state legislature that are based upon complete information relative to the Department's programs and operations. And on Federal legislation how our input is translated into either amendments added to bills or sections of federal law. Additionally, we will measure how many partners with whom we are able to work on efforts that lead to successful legislative outcomes.</p>
<p>Resources Needed – Currently I have one analyst who is assigned to work with me on Legislative issues and priorities. The cost of this effort is related to the salary and benefits for that employee.</p>

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
Work with the Divisions on Legislative priorities	Annually	X
Seek ideas from community partners such as NGOs and VSOs	September	X
Review Ideas – internal	1 Oct annually	X
Prepare proposals to send to GO	1 Nov annually	X
Find Authors for approved ideas	Annually by Mid-Jan	X
Prepare for hearings with analysis	On going	X
Prepare Enrolled Bill Reports for GO as needed	On going	
Meet with Legislators and their staff to educate them on programs and issues relative to the department	On going	X
Set meetings with members of Veterans Affairs Committees and the Secretary	1 July 2011	X
Set up an Off-Site meeting with the two Veterans Affairs Committees to provide a more complete briefing on the operations of the Department – This initiative was delayed due to on-going budget negotiations in the Legislature	15 Sept 2011	
Set up meetings with Congressional Members who either represent heavy vet populations or serve on House Veterans Committee – like the issue above	30 Sept 2011	

this initiative was delayed due to efforts associated with the budget.		
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Progress Report

The principle objective for this unit is to advocate for the veterans of this state in the Legislature and help improve the delivery of services to those veterans through legislative actions that will promote education and outreach efforts and improve the delivery of services to veterans and their families. With the shift in emphasis in this department to Veteran Services and outreach, and subsequent cuts in the budget, the department must partner with allies in the Legislature and Congress that can help us educate the public and veterans and their families about benefits and services. This partnership and education is being done through efforts with Legislative members such as the distribution of the Veterans Resource Book, face-to-face meetings with key members of committees, organizing community forums, participating in Veteran specific events linked Women's Military History Week, Memorial Day, Welcome Home Vietnam Veterans Day, and Veterans Day.

We still have more to do on the outreach to Congressional representatives in this state as we have been principally focused on educating the new members of the two state Legislative Veterans Committees.

California Department of Veterans Affairs Business Plan Plan of Action Worksheet

Division: Communications Office

Strategy: Develop media and outreach strategies for programs and divisions.

<p>Objective 4.2.1: Tell the story of the department and its role in the delivery of services and advocacy for those services to veterans in California by providing advice, guidance and advocacy. How we'll get there: Through partnerships with community groups such as the VetFund Foundation, veteran service organizations, non-government agencies and the media, we will provide a clear picture of the challenges and successes of today's veterans in California.</p>
<p>Projected Date for Achieving the Objective: As this is, and should be, an on-going effort there is an on-going deadline for completion dependent upon the issue or event. For example, the recent tours of homeless shelters which have led to the establishment of MOUs between this department and several non-profit non-governmental agencies that help homeless veterans. Additionally the strategic placement of opinion pieces and letters to the editor in local media which has been done following the tours of local shelters or veteran-related events such as the health fair sponsored by the Sacramento Observer Newspaper.</p>
<p>Performance Measure Success will be measured by the number and type of Op-Eds we are able to place, the number of news articles that are published either in Newspapers, magazines, blogs, and newsletters or on-line and the number of reports filed on television and radio. Recent events such as the donation of clothing to local homeless shelters for women and tours of homeless shelters have led to coverage in local media. Another measurement has been the number of new partnerships that have been developed and culminated in the establishment of MOUs with partner agencies such as PATH and New Directions. We also will look at the number of community outreach events that we are able to plan that result in good participation of veterans, their families and the community.</p>
<p>Resources Needed – This effort has been greatly aided by the recent addition of three new staff to the communications operations through redirections of positions from the program divisions. One of these staff members has been tasked with partnering with the Deputy Secretary for Women and Minority Veterans, another was tasked with partnering with the Deputy Secretary for Veteran Services and the third was tasked with assisting the Assistant Secretary for Native American Veterans and with the Mexican American Veterans Memorial Committee and the Deputy Secretary for Farm and Home Loans. Another additional resource has been the establishment of a contract with Marketplace Communications (\$44,000) to advise the department on our communications and coalition-building efforts.</p>

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
Assign staff to become SMEs for key divisions – Assign staff to be liaisons with each of the program divisions and ensure they become experts on the issues	Jan 2, 2011	X
Ensure staff members are connected with Divisions – make sure each SME is participating in divisional staff meetings and meeting regularly with Deputies.	Jan 31, 2011	X
Outreach events – There have been several events with homeless providers that have led to good media coverage in local communities. We are in the process of scheduling community events in key locations (Legislative districts for members of the Veterans Committees) throughout the state.	29 July 2011	
Targeted Op-Ed placement – Initially we were planning to schedule out a series of Opinion pieces but we have found that it has been more effective to get these pieces placed if they are tied to an event such as visits to homeless	On-going	

shelters. We will continue to push this effort especially to be timed to run near holidays such as Memorial Day and Veterans Day and events such as the Secretary's Conference and the Women Veterans Conference.		
Community Forums/Outreach – Develop a calendar that will include planned events that will highlight key strategic efforts of the department such as Homeless Veterans, long-term care for elderly veterans, education benefits for veterans, outreach for minority veterans, LGBT veteran rights, and the First Responders Day at the State Fair.	29 July 2011	

Progress Report

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California Department of Veterans Affairs Business Plan Plan of Action Worksheet

Division: Communications Office

Strategy: Develop and implement a dynamic web presence for the department.

Objective 4.3: Attract readers and capitalize on new technologies.

How we'll get there: Provide exceptional advice, guidance and design when developing and maintaining the Department's Internet Website.

Projected Date for Achieving the Objective: The Development of the Veterans Website (www.veterans.ca.gov) was completed last year and we are now embarking on an effort to streamline and redesign the department's official website so that it meets current state standards (including ADA requirements) and is more easily navigable for those people who are looking for information about the Department. This should be completed by 15 May 2011 with full ADA compliance by 1 July 2011.

Performance Measures – The successful implementation of changes and maintenance of the department's two websites and the continued development and inclusion of information on the veterans website – www.veterans.ca.gov. Additionally, once the department's homepage is redesigned and a content management program is implemented by 1 July 2011 we will update and check the websites utilization through on-line surveys and tracking programs.

Resources Needed: The department has dedicated one full-time staff person to manage and design the department's websites. We have also had to purchase additional programs that were needed for better management of the department's sites.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed?
Maintain information on the current websites	On-going	<input checked="" type="checkbox"/>
Update information	On-going	<input checked="" type="checkbox"/>
Utilize new technologies and resources such as social networks	On-going	<input checked="" type="checkbox"/>
Maintain and update standards and policies for web content	1 August 11	<input type="checkbox"/>
Update the design of the Department's website	1 July 11	<input type="checkbox"/>
Implement tracking and content management program	1 May 2011	<input type="checkbox"/>
Implement ADA standards for Department Website	1 July 2011	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

The Website Governance Committee has been meeting on a monthly basis and each of the divisions' representatives has been working with the Website manager to ensure that the information on the Department's website is up-to-date. Once the website is fully redesigned the site will be streamlined so that visitors to the website will more easily be able to find information about programs and services within the Department.

California Department of Veterans Affairs Business Plan Plan of Action Worksheet

Division: Communications Office

Strategy: Provide advice, guidance and advocacy when developing media and outreach strategies for programs and divisions.

Objective 4.2.2: Tell the story of the department and its role in the delivery of services and advocacy for those services to veterans in California.

How we'll get there: Produce an exceptional and information packed newsletter that will be sent to our core customer groups and interested parties such as veterans service organizations, residents in our state veterans homes, CalVet staff, legislators, media and non-profits organizations that help veterans.

Projected Date for Achieving the Objective: This is an on-going project that will be capitalizing on the use of services such as Facebook and Twitter and along with electronic list-serve tools to better penetrate the market with our story and keep costs down.

Performance Measures – Newsletters are produced in a timely manner and include information that is useful to our constituency groups and customers. Design and production of the newsletter is completed in a timely manner. The Newsletters are to be published at the beginning of each month.

Resources Needed – No additional staff is needed as this newsletter is being produced by the existing staff and resources of the Communications office.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
Collect information and photos for stories – remind regional office, district offices and each home to submit stories and ideas to the newsletter editor	60-15 days out	<input type="checkbox"/>
Review and Edit articles	15 days out	<input type="checkbox"/>
Provide articles and photos/graphics to graphic artist	15-10 days out	<input type="checkbox"/>
Review mock-up of newsletter	7-3 days	<input type="checkbox"/>
Finalize edits on mock-up	3-1 day	<input type="checkbox"/>
Publish Newsletter on line and via print	First of the month	<input type="checkbox"/>
Establish guidelines for the newsletters and publish those for contributors	1 Feb 2011	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

The Office has now been able to produce the newsletter on a monthly basis. We have published an issued each month since the newsletter was reinitiated. We are in the process of working through a new challenge of publishing an on-line version of the newsletter that meets the requirements of state ADA guidelines. Since the newsletter is heavily weighted with graphics, the ADA compliance issue has created a challenge that may require modification of the design.

California Department of Veterans Affairs Business Plan Plan of Action Worksheet

Division: Communications Office

Strategy: Strategic utilization of video messages from the Secretary and leadership of the department that can be posted on the Intranet and later on the Internet.

Objective 4.4: Improve internal communications initially and external communications in the future.

How we'll get there: Produce regular messages from the Secretary and department leadership that will highlight policy objectives and provide improved communications with line staff within the department, particularly at it remote locations such as the veterans homes.

Projected Date for Achieving the Objective: This is another one of those projects that once it is established there will be on-going deadlines. With that said, the plan would be to have the first video message taped and produced by the end of the Second quarter of this calendar year – 31 May 2011. This would be an opportunity to talk about key efforts of the department to Drive the National Agenda.

Performance Measures: Number of video messages distributed annually

Resources Needed: We will need to provide training to selected staff. We also will work with our contract agency (Marketplace Communications) for the production of the first few messages as they recently added that service to their menu of skills.

Plan of Action	Timeline	Progress
What interim steps are necessary to implement/reach objective?	When will the step be completed?	Completed ?
Obtain video equipment from IT – the department currently has an HD video cameras that on loan to the Communications unit from IT.	28 February 2011	<input checked="" type="checkbox"/>
Ensure staff are trained in digital editing programs	31 Aug 2011	<input type="checkbox"/>
Set up a location where the video can be produced	28 February 2011	<input checked="" type="checkbox"/>
Develop a production schedule for the video focusing on subjects for each video	29 July 2011	<input type="checkbox"/>
Schedule time for the Secretary to record the first video message	15 May 2011	<input checked="" type="checkbox"/>
Finalize production of the first video	29 July 2011	<input type="checkbox"/>
Distribute the video to Veterans Homes	15 Aug 2011	<input type="checkbox"/>
Air the first internal video message	15 Aug 2011	<input type="checkbox"/>
Develop schedule for production of external video message	29 July 2011	<input type="checkbox"/>

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

This is a new effort that the Department will be undertaking to better communicate first with staff throughout the Department, then with community partners via the internet and community forums. The department currently has the assets to produce these messages, it is just a matter of ensuring staff is properly trained to produce the videos.

Capital Assets and Facilities Management
Financial Services Division

Division: Financial Services Division

Strategy: Appropriately align positions that are providing services to the Farm & Home Division.

Objective 1: Update the Farm & Home Cost Allocation calculation that has been in use for several years.
Projected Date for Meeting Goal: December 2015
Resources Needed (include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources). <ul style="list-style-type: none"> Current staff within the Financial Services Division will be utilized to accomplish this objective.
Performance Measures - How will completion be determined (what are the metrics) and how to measure ongoing success? This may also include interim milestone metrics to demonstrate progress toward final objective achievement.

Plan of Action

What interim steps are necessary to attain goal?	When will they be completed?	Completed?
Identify current staff resource(s).	July 1, 2011	Yes
Develop a time study document to capture staffs' time.	August 2011	No
Conduct/Complete a time study once per quarter – targeting a sampling of staff within Veterans Services, Farm and Home, Veterans Home Division, and various HQ Administrative Offices.	June 2012 & June 2013	No
Via the time study information, identify the number of staff providing services to Veterans Services, Farm & Home, Veterans Home Division and various HQ Administrative Offices	July 2012 & July 2013	No
The Cost Accounting Office will review the findings from the time study to determine if current cost allocation calculations need to be modified/updated.	August 2012 & August 2013	No
Determine if internal or formal budgetary and/or fiscal actions need to be taken relative to changing budgetary items identified in the Governor's Budget, funding sources for staff positions, etc.	January 2014	No
If formal budgetary actions are required (Budget Revision, BCP, etc.), submit accordingly through the appropriate budgetary process.	December 2014	
Establish, revise and implement internal policies, procedures & business practices to reflect the finding(s). Establish future dates as to when this time study should be conducted in order to maintain appropriate cost allocation calculations.	December 2015	No

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

None at this time.

California Department of Veterans Affairs Business Plan Plan of Action Worksheet

Division: Financial Services Division

Strategy: Assist Veteran Homes & CDVA programs in the efforts to increase revenues and reimbursements.

Objective 2: Establish a program review and evaluation function to set benchmarks and identify improvements that will increase efficiencies, revenues and reimbursements.

Projected Date for Meeting Goal: January 2012 and ongoing.

Resources Needed (include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources).

- Need 1 or 2 positions redirected from vacancies or redirect existing qualified staff.
- Staff Services Manager I (\$61K Yearly Salary) & Associate Governmental Program Analyst (\$53K Yearly Salary).

Performance Measures - How will completion be determined (what are the metrics) and how to measure ongoing success? This may also include interim milestone metrics to demonstrate progress toward final objective achievement.

Plan of Action

What interim steps are necessary to attain goal?	When will they be completed?	Completed?
Identify resources to establish the Program Evaluation function.	January 2012	No
Benchmark how current \$\$ are being received and utilized.	June 2012	No
In conjunction with the Cost Accounting Office, establish a base to measure the cost of care provided by each of the Veterans Homes.	January 2013	No
Identify improvements that will increase efficiencies, revenues and reimbursements.	December 2012 – June 2016	No
Provide semi-annual update/reports to CDVA management & appropriate stakeholders on progress/benchmarks/improvements.	June 30, 2012 – June 2016	No
Develop, establish, revise and implement policies and procedures/internal business practices.	June 2012- June 2016	No

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc).

4-Year Goal – This goal has been set aside for 12 months as the Department has many other project priorities that require position redirections.

California Department of Veterans Affairs Business Plan Plan of Action Worksheet

Division: Financial Services Division

Strategy: Provide exceptional customer service that enables the programs to attain their goals.
Assist veterans homes in attaining/maintaining a 5-Star Rating.

Objective 3: Cost Accounting staff will prepare the cost reports which are currently being completed with assistance from a contractor.
Projected Date for Meeting Goal: June 2012
Resources Needed (include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources). <ul style="list-style-type: none"> No additional resources identified at this time.
Performance Measures - How will completion be determined (what are the metrics) and how to measure ongoing success? This may also include interim milestone metrics to demonstrate progress toward final objective achievement.

Plan of Action

What interim steps are necessary to attain goal?	When will they be completed?	Completed?
Prepare/process contract for contractor to provide training and assistance with submittal of 2010 and 2011 fiscal year reports.	June 2010	Yes
Identify resources for obtaining the training. (To be provided by current contractor and outside sources.)	August 2010 -December 2011	Yes - Ongoing
Schedule regular monthly meetings with staff and stakeholders. Meetings will be held during the 2 nd week of each month.	Ongoing	No
Develop and implement policies and procedures/internal business practices.	June 2012	No

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current Contractor provided the necessary training to Cost Accounting staff during the 2010 calendar year. Contractor will perform a cursory review of the cost reports for 2010/2011 before the contract expires during the 2011 calendar year. IT is looking into the purchase/use of Predictive Software. Will receive feedback from IT by the end of the fiscal year 2010.2011. (This could be useful for various statistical reports created by Cost Accounting.)

California Department of Veterans Affairs Business Plan Plan of Action Worksheet

Division: Financial Services Division

Strategy: Provide efficient service that enables HQ programs and the Veterans Homes to meet their goals of providing quality services and care to the veterans and their families that utilize CDVA's services.

Objective 4: The programs within FSD will provide cross-training (within their functional areas) to staff in acquisitions and contracts; accounting; cost and systems accounting; medical billing; and budgeting.

Projected Date for Meeting Goal: June 2012 and Ongoing

Resources Needed (include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources).

- No additional resources identified at this time.

Performance Measures - How will completion be determined (what are the metrics) and how to measure ongoing success? This may also include interim milestone metrics to demonstrate progress toward final objective achievement.

Plan of Action

What interim steps are necessary to attain goal?	When will they be completed?	Completed?
Develop a template/draft document to provide cross training (timelines of who will participate and specific tasks/projects identified for training).	September 2010	Yes
Identify coaches/mentors for cross-training.	Sept/Oct 2010	Yes
Solicit staff volunteers to participate in cross-training program.	November 2010 through November 2011	Yes
Have monthly meetings with staff to discuss progress, changes, adjustments, feedback.	January 2011 & Ongoing	Yes
Obtain customer and/or staff feedback on changes/improvements (if any) in FSD functional areas.	June 2012	No
Evaluate progress	June 2012	No

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

As not to disrupt the day to day activities, consideration will be given to providing cross-training to 1 or 2 staff at a time.

California Department of Veterans Affairs Business Plan Plan of Action Worksheet

Division: Financial Services Division

Strategy: Provide efficient financial services that enable the programs to attain their goals.

Objective 5: Implement the State's Fi\$Cal Financial System
Projected Date for Meeting Goal: July 2014/2015
Resources Needed (include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources). <ul style="list-style-type: none"> No additional resources identified at this time.
Performance Measures - How will completion be determined (what are the metrics) and how to measure ongoing success? This may also include interim milestone metrics to demonstrate progress toward final objective achievement.

Plan of Action

What interim steps are necessary to attain goal?	When will they be completed?	Completed?
Identify CDVA Subject Matter Experts (IT, & Accounting)	May 2010	Yes
Identify CDVA systems that will interface with the Fi\$Cal System	June 2010	Yes
Participate in the development of the system documentation and requirements.	January 2013	No
Train CDVA staff on Fi\$Cal System.	January 2014- December 2014	No
Implement Fi\$Cal System.	January 2014- December 2014	No
Evaluate, Provide feedback.	Calendar Year 2015	No

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

2- 5 Year goal. CDVA is participating Bi-Monthly with Fi\$Cal project staff in the development of system documentation and requirements.
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California Department of Veterans Affairs Business Plan Plan of Action Worksheet

Division: Financial Services Division

Strategy: Provide exceptional customer service that enables the programs to attain their goals.

Objective 6: Define the business needs for Accounting, Billing, Budgeting, Purchasing, Contracting and Cost Accounting in relation to the implementation the EW-VHIS.

Projected Date for Meeting Goal: July 2012

Resources Needed (include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources).

- No additional resources identified at this time. (Solely based on the fact that the software has yet to be identified for the purchasing, contracting and cost accounting functions of FSD.)

Performance Measures - How will completion be determined (what are the metrics) and how to measure ongoing success? This may also include interim milestone metrics to demonstrate progress toward final objective achievement.

Plan of Action

What interim steps are necessary to attain goal?	When will they be completed?	Completed?
Identify Integrated Process Team (IPT)/Subject Matter Experts	July 2010	Yes
Develop a Financial IPT Charter	October 2010	Yes
Determine the information needed for the various financial functions.	December 2010	Yes
Document Business Needs/Processes for FSD functions.	November 2010 – March 2011	Yes
Determine Readiness of FSD to participate in the Pilot Implementation. Determine if commercial off the shelf software is a viable alternative.	July 2011 – January 2012	No
Provide Training to FSD Staff.	2011/2012 Calendar Years	No
Identify CDVA systems that will interface with the EW-VHIS System	December 2011	No
Determine the roles of EW-VHIS vs. CalStars/Fi\$Cal	2011 Calendar Year	No

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

The overall process of achieving this goal and implementing business procedures is contingent upon the implementation of the EW-VHIS and whether the chosen vendor can accommodate FSD functional requirements/needs. CDVA will determine if commercial off the shelf software is a viable alternative.

Information Services Division**Administrative Services Strategic Goals Implementation Plan****Division: Information Services Division****Strategy 1:** Optimize operational efficiencies to better support programs

Objective 1: Capture and maintain complete operational workload staffing and service catalogue
Projected Date for Achieving the Objective: October 2012
Performance Measures (what are the metrics?): <ul style="list-style-type: none"> • Completed operational workload matrix which identifies all current on-going activities • Completed operational workload matrix which identifies all current resources with work estimates • Completed matrix of Commercial off the Shelf (COTS) software • Completed matrix of current and future core competencies • Completed service catalogue • Service catalogue available to all CDVA
Resources Needed: Current resources include: ISD Senior Management Team Data Processing Manager II (2) Staff Information Systems Analyst
Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Identify, analyze, and document current operational workload for ISD staff		
a. Identify current operational workload being performed by ISD staff	N/A	June 2010
b. Assign resources to operational activities	N/A	June 2010
c. Resource work estimates	N/A	June 2010
d. Annual review of operational workload and resource activities	N/A	Ongoing
e. Identify all COTS software	February 2011	March 2011
2. Determine ISD resource capacity		
a. Analyze current workload baseline	April 2011	
b. Determine ISD resource availability	April 2011	
3. Create service catalogue		

a. Define ISD service offerings	July 2011	
b. Identify additional services not currently offered	August 2011	
c. Design catalogue	January 2012	
d. Develop catalogue	July 2012	
e. Distribute catalogue	September 2012	
f. Market catalogue	October 2012	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- November 2010 – In the process of developing a project schedule and assigning resources
- December 2010 – Meeting to update the current workload, identify all COTS software, and identify ISD resources is scheduled for February 2011
- March 2011 – COTS software was identified and is located in the Enterprise Architecture Directory. The EA is currently validating/verifying all systems that the homes use and will have the final version delivered by April.
- June 2011 – This objective will be revised and re-baselined in the Strategic Plan for 2011-2016

Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 1: Optimize operational efficiencies to better support programs

Objective 2: Establish asset management capability
Projected Date for Achieving the Objective: June 2012
Performance Measures (what are the metrics?): <ul style="list-style-type: none"> • Track hardware and software assets • Assign assets to customers, locations, departments, and rooms • Consolidation of inventory • Generate reports • Software compliance • Refresh plans prepared for Fiscal years 2012 through 2015
Resources Needed: Current resources include: (2) Senior Information Systems Analyst ISD Senior Management Team (1) Staff Information Systems Analyst (1) Systems Software Specialist I (2) Program Staff Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Asset management tool		
a. Define functional requirements	May 2011	May 2011
b. Perform market survey using Gartner Group	June 2011	June 2011
c. Select best valued asset management tool	July 2011	
2. Implement and utilize tool		
a. Procure asset management tool	October 2011	
b. Deploy and test asset management tool	December 2011	
c. Implement asset management tool	March 2011	
3. Refresh plan		
a. Develop strategy to use asset management tool to assist in developing annual refresh plans	December 2011	
b. Develop draft refresh plan for 2012/2013	December 2011	
c. Develop refresh plans for 2013/14 through 2015/16	February 2012	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- May 2011 – Preparations for trial-ware software for testing and evaluation has been started and will be updated to reflect vendor responses to the Request For Information (RFI) notifications sent out.
- June 2011 – RFI notification will be re-issued to interested vendors in July 2011. The responses received were incomplete. This is also an initiative that is being tracked by the Executive Advisory Board and is merged with Service Desk/Asset Management initiative.

Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 1: Optimize operational efficiencies to better support programs

Objective 3: Maintain and support all applications
Projected Date for Achieving the Objective: December 2011
Performance Measures (what are the metrics?): <ul style="list-style-type: none"> Efficiency plan for developing, maintaining and supporting all applications through the system development life cycle
Resources Needed: It is estimated that 6 resources (DPM III, DPM II, Senior PA Analyst, Senior ISA Analyst, Senior ISA Supervisor) will dedicate approximately 10% of their availability to this task as higher priority tasks are completed. In addition as new and existing applications are developed and/or maintained resources are evaluating and increasing efficiencies through establishing repeatable processes and following best practices. Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Develop recommendations for increasing efficiencies in maintaining and supporting all applications		
a. Draft recommendations	September 2011	
b. Approve recommendations	October 2011	
c. Implement recommendations	December 2011	
2. Implement efficiency plan		
a. Provide overview of plan to managers and staff	October 2011	
b. Distribute plan	November 2011	
c. Ensure activities and tasks identified in the plan are being performed	N/A On-going	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- December 2010 – In the process of re-evaluating, consolidating, and expanding POA.

- March 2011 – Change control and environmental standardization processes have been developed. A standardized maintenance schedule has been developed for web services. Team is evaluating and increasing efficiencies through established repeatable processes and following best practices. Backup and Disaster recovery processes are being implemented for Meditech, Mitas and Web Services.
- June 2011 – This objective will be reevaluated based on the new Strategic Plan 2011-2016.

Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 1: Optimize operational efficiencies to better support programs

Objective 3: Succession planning for Application and Web Support
Projected Date for Achieving the Objective: July 2012
Performance Measures (what are the metrics?) <ul style="list-style-type: none"> Efficiency plan for succession planning
Resources Needed: Resources will be obtained through the redirection of staff. A 5% position support will be required from Meditech, Mitas and Web Services. Resources will be outlined prior to work beginning. Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Develop recommendations for succession planning		
a. Draft recommendations	May 2012	
b. Approve recommendations	June 2012	
c. Implement recommendations	July 2012	
2. Implement efficiency plan		
a. Provide overview of plan to managers and staff	June 2012	
b. Distribute plan	July 2012	
c. Ensure activities and tasks identified in the plan are being performed	N/A on-going	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- December 2010 – In the process of re-evaluating, consolidating, and expanding plans of actions
- March 2011 – No new update
- June 2011 – This objective will be reevaluated based on the new Strategic Plan 2011-2016.

Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 1: Optimize operational efficiencies to better support programs

Objective 3: Maintain and support Mitas, Meditech and Web Server Environment
Projected Date for Achieving the Objective: December 2011
Performance Measures (what are the metrics?) <ul style="list-style-type: none"> Efficiency plan for maintaining and supporting Mitas, Meditech and Web Server environments is completed and distributed
Resources Needed: It is estimated that two server staff (Senior ISA Sup and System Software Specialist II) will dedicate about 25% of their time to this effort to create the plan.
Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Develop recommendations for maintaining and supporting Mitas and Meditech servers and Web Server Environments		
a. Draft recommendations	September 2011	
b. Approve recommendations	October 2011	
c. Implement recommendations	December 2011	
2. Implement efficiency plan		
a. Provide overview of plan to managers and staff	November 2011	
b. Distribute plan	November 2011	
c. Ensure activities and tasks identified in the plan are being performed	December 2011	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- January 2011 – Activities have not begun for these tasks
- March 2011 – No new update
- June 2011 – This objective will be reevaluated based on the new Strategic Plan 2011-2016.

▪ Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 1: Optimize operational efficiencies to better support programs

Objective 3: Succession Planning for Customer Support Section
Projected Date for Achieving the Objective: April 2012
Performance Measures (what are the metrics?)
<ul style="list-style-type: none"> • Efficiency plan for succession planning is completed and distributed
Resources Needed: It is estimated that five resources from the Customer Support Section will dedicate about 10% of their time to this effort – DPM III, Staff ISA Sup (2), Associate Info Analyst (2) once project commences. Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Develop recommendations for succession planning		
a. Draft recommendations	December 2011	
b. Approve recommendations	January 2012	
c. Implement recommendations	April 2012	
2. Implement efficiency plan		
a. Provide overview of plan to managers and staff	February 2012	
b. Distribute plan	March 2012	
c. Ensure activities and tasks identified in the plan are being performed	April 2012	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- January 2011 – Activities have not begun for these tasks
- March 2011 – No new update
- June 2011 – This objective will be reevaluated based on the new Strategic Plan 2011-2016.

Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 1: Optimize operational efficiencies to better support programs

Objective 3: Service Request process improvement
Projected Date for Achieving the Objective: October 2011
Performance Measures (what are the metrics?)
<ul style="list-style-type: none"> Efficiency plan for improving service request process is completed and distributed
Resources Needed:
It is estimated that two resources from the Customer Support Section will dedicate about 25% of their time to this effort.
Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Develop recommendations for improving the service request process		
a. Draft recommendations	July 2011	
b. Approve recommendations	August 2011	
c. Implement recommendations	October 2011	
2. Implement efficiency plan		
a. Provide overview of plan to managers and staff	August 2011	
b. Distribute plan	September 2011	
c. Ensure activities and tasks identified in the plan are being performed	October 2011	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- January 2011 – Activities have not begun for these tasks
- March 2011 – This effort may roll up into the Service Desk Enhancement/Asset Management project that is currently part of the EAB portfolio.
- June 2011 – This effort will be addressed under the Service Desk Enhancement/Asset Management Project as part of the EAB portfolio.

Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 1: Optimize operational efficiencies to better support programs

Objective 3: Procurement process improvement
Projected Date for Achieving the Objective: July 2011
Performance Measures (what are the metrics?) <ul style="list-style-type: none"> • Ability to track and provide status of all purchase orders • Ability to create purchase orders with less than 5% error rate • Ability to process 95% of purchase orders within prescribed timeframes
Resources Needed: Current resources include: (1) Staff Information Systems Analyst (2) Associate Information Systems Analyst (2) Assistant Information Systems Analyst (1) Data Processing Manager III Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Develop recommendations for improving the procurement process		
a. Draft recommendations	April 2011	April 2011
b. Approve recommendations	May 2011	May 2011
c. Implement recommendations	May 2011	May 2011
d. Update existing procurement policy	July 2011	
e. Update procedures	August 2011	
f. Implement new policy and procedures	September 2011	
2. Implement efficiency plan		
a. Provide overview of plan to managers and staff	November 2011	
b. Distribute plan	November 2011	
c. Ensure activities and tasks identified in the plan are being performed	December 2011	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- January 2011 – The IT Procurement and Contracting Unit is working closely with the Helpdesk to draft new procedures. The team met to determine timeframes on each step of the process. This team also met with the Office of Procurement and Contracting to coordinate and streamline processes that involve them. On-going discussions are continuing to map out processes.
- March 2011 – The IT Procurement and Contracting Unit has centralized all IT procurement at Headquarters. This effort was coordinated with the Headquarters Helpdesk. Procedures were drafted and sent to each of the Homes. The current IT Procurement Policy is being revised to reflect these new procedures and should be completed by April 30, 2011.
- June 2011 – The IT Procurement and Contracting Unit, along with the Helpdesk, is fine-tuning the procedures. In addition, a policy needs to be updated to reflect the new procedures. New policies and procedures will be drafted by August 30, 2011.

Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 1: Optimize operational efficiencies to better support programs

Objective 3: Change Management Process Improvements
Projected Date for Achieving the Objective: July 2011
Performance Measures (what are the metrics?)
<ul style="list-style-type: none"> Efficiency plan for the change management process is completed and distributed
Resources Needed:
Current resources include: (1) Staff Information Systems Analyst (1) Associate Information Systems Analyst (1) Data Processing Manager III 5% of time Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Develop recommendations for the change management process		
a. Draft recommendations	April 2011	April 2011
b. Approve recommendations	April 2011	April 2011
c. Implement recommendations	April 2011	April 2011
2. Implement efficiency plan		
a. Provide overview of plan to managers and staff	May 2011	May 2011
b. Distribute plan	May 2011	May 2011
c. Ensure activities and tasks identified in the plan are being performed	July 2011	June 2011

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- January 2011 – Currently analyzing the Change Management process developed for Ew-VHIS to see if this would work as a tool for all changes in ISD.
- March 2011 – Rochelle Dann and Sara Davis have been assigned to develop a charter, procedures, and an online form in SharePoint. All items are currently in draft and will be finalized by April 30, 2011.

- June 2011 – The charter, process flowchart, and procedures were developed and approved in April as well as development of the Change Management Team (CMT) and Change Management Board (CMB). All parties involved in the process were trained and implementation began May 2011. The CMT meets weekly beginning on May 12, 2011. All activities above are complete.

Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 1: Optimize operational efficiencies to better support programs

Objective 3: Project Portfolio and Activity Tracking
Projected Date for Achieving the Objective: July 2011
Performance Measures (what are the metrics?) <ul style="list-style-type: none"> All IT projects are tracked in the portfolio management system All IT projects are tracked for resource allocation and interdependencies of projects in the portfolio
Resources Needed: Current resources include the PMO: (1) Data Processing Manager II (2) Sr. Information Systems Analysts (2) Staff Information Systems Analysts (1) Associate Information Systems Analyst 5% of time Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Develop recommendations for project portfolio management software		
a. Draft recommendations	May 2011	
b. Approve recommendations	May 2011	
c. Implement recommendations	June 2011	
2. Implement efficiency plan		
a. Provide overview of plan to managers and staff	June 2011	
b. Distribute plan	June 2011	
c. Ensure activities and tasks identified in the plan are being performed	July 2011	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- January 2011 – ISD has no current method of tracking activities or project management portfolio. Analysis is being done to determine if the tracking can be done using MS Project.
- March 2011 – Requirements meeting for portfolio management tool will be held early May 2011 and recommendations will be presented to ISD Senior Management Team for approval.
- June 2011 – This objective will be updated in the new Strategic Plan 2011-2016.

Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 2: Strengthen security to better protect CDVA confidential and sensitive information

Objective 1: Create current security, roles/responsibilities, and publish
Projected Date for Achieving the Objective: September 2011
Performance Measures (what are the metrics?) <ul style="list-style-type: none"> Agency Information Security Office (AISO) to review, research, update, and publish IT policies to reflect current business practices and align with directives from the State Information Security Office, CALOHill, and applicable government code CDVA-wide distribution, review, and acknowledgement by all employees and stakeholders with network/email access
Resources Needed: It is anticipated that 20% of staff time by AIO (CEA III) and AISO (Sr. ISA, Supervisor) will be dedicated to this effort. Other resources to be considered: (1) Staff Information Systems Analyst (1) Associate Information Systems Analyst (2) Data Processing Manager III Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Review current CDVA IT policies	August 2010	September 2010
2. Research recommended IT Policy set to align with CDVA business practices, regulations, and CTA/OIS directives	September 2010	September 2010
a. Determine policies scope	January 2011	February 2011
b. Vet recommended policy set through AIO	January 2011	February 2011
3. Draft "new" initial policies, Update "current" policies	February 2011	In Progress
4. Issue policies to ISD Management for review	March 2011	In Progress
5. Distribute policies to Stakeholder "boards" for review	May 2011	In Progress
6. Receive comments and recommended revisions	June 2011	In Progress
7. Incorporate comments into "revised drafts"	July 2011	
8. Draft "revised" policies	August 2011	
9. Redistribute policies to ISD and Executive	October 2011	

Management Teams for approval		
10. Gain approval by both groups	November 2011	
11. Distribute CDVA-wide (Intranet, Silver Chair (Vet Homes)	January 2012	
12. Publish approved policies on CDVA Intranet	January 2012	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- September 2010 - Drafted a "new" Electronic Communications Policy and sent it to Former AIO, Don Richards, and Deputy Secretary Kirwan for review. Completed a review of existing and planned to be completed policies and provided recommendations; a copy provided to Former AIO, Don Richards, for review. Recommendations shared with ISD Executive Management for situational awareness. Following input from Enterprise Wireless Project Team, drafted an Enterprise Wireless Policy and set of standards to accompany them. Revised Electronic Communications and Enterprise Wireless Policies are pending approval. Business Impact Assessment is pending.
- December 2010 – Currently, re-evaluating the Business Impact Assessment element. Two (2) policies drafted, Electronic Communications and Enterprise Wireless, have been presented to AIO for review. AIO review and recommendations are pending.
- January 2011 – The two (2) "draft" policies have been reviewed by AIO and the ISD Senior Management Team. AIO has solicited comments and recommendations are due 2/4/2011.
- March 2011 – Initial comments on "draft" policies have been provided. Final comments are being made and the eMail, Intranet and Internet Policy will be vetted by Executive Management in April. Based on current timelines, this objective is being re-base lined.
- June 2011 – Additional edits are being made and the Email, Intranet and Internet Policy will be released this month – June. Currently, the AIO and AISO are working on the following "draft" policies: Enterprise Wireless Usage, Passwords, Mobile Devices, and Social Media Usage.

Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 2: Strengthen security to better protect CDVA confidential and sensitive information

Objective 2: Improve Information Security Training Program
Projected Date for Achieving the Objective: October 2012
Performance Measures (what are the metrics?) <ul style="list-style-type: none"> Review and revise training content to align with current technology and compliance directives e.g., State ISO, CALOHI (HIPAA) by October 31, 2012
Resources Needed: It is anticipated that 10% of AISO (Sr. ISA, Supervisor) will be dedicated to this effort. Other resources to be considered: (1) AIO (CEA III) (1) Staff Information Systems Analyst (1) Associate Information Systems Analyst (1) Nurse Instructor Chief Privacy Officer/HIPAA Program Coordinator (SSM I) Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Review current on-line Information Security Training	May 2011	In Process
2. Conduct training needs assessment	July 2011	To re-baseline within "new" Strategic Plan
3. Identify CDVA Information security training needs	September 2011	
4. Create training to address #2	October 2012	
a. Develop project plan and schedule	October 2012	
b. Obtain Application Development resources	October 2012	
c. Determine Application Development framework i.e., .Net	October 2012	
d. Design course content within framework	October 2012	
e. Vet course contents through CDVA stakeholders	October 2012	
f. Gain approval of course contents from CDVA stakeholders	October 2012	

g. Determine delivery method e.g., Intranet, Silver Chair (Homes)	October 2012	
h. Release training course to all applicable CDVA stakeholders	October 2012	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- January 2011 – AIO is currently reviewing course content
- February 2011 – AIO provided feedback on first section to AISO
- April 2011 – AISO reviewed comments, feedback, and plans to change content within section
- June 2011- AISO will be working with ISD Management Team to align current course content with CDVA business needs, current technology, and strategic planning initiatives.

Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 2: Strengthen security to better protect CDVA confidential and sensitive information

Objective 4: Create security risk assessment and risk management process
Projected Date for Achieving the Objective: January 2013
Performance Measures (what are the metrics?) <ul style="list-style-type: none"> Determine Risk Management Objectives for CDVA and implement State of California Risk Management Methodology for Information Technology Systems
Resources Needed: Senior Information Systems Analyst – 5% until project begins in 07/01/2011 At this point, resources have not been fully determined for this effort. Undertaking an agency-wide Risk Assessment, including data classification, will be a significant effort and will involve a team, potentially consisting of: (1) AIO (CEA III) (1) AISO (Sr. ISA, Supervisor) (1) EA (Sr. ISA) (1) Chief Privacy Officer/HIPAA Program Coordinator (SSM I) (5) Analytical Support Staff within the Veterans Homes Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Determine risk from current security architecture and vision		
a. Adopt Risk Analysis and apply standard Risk Analysis Methodology as part of CDVA Enterprise Architecture	August 2012	To re-baseline within "new" Strategic Plan
2. Build risk management process		
a. Understand State of California's Office of Information Security's Risk Management Methodology	August 2012	
b. Adopt State of California's Office of Information Security's (OIS) Risk Management Methodology	August 2012	
c. Adopt OIS's Risk Assessment Procedure (In Draft)	August 2012	

d. Adopt OIS's Information Asset Classification Standard (In Draft)	August 2012	
3. Conduct Agency-Wide Risk Assessment		
a. Asset Identification	January 2013	
b. Threat Identification and Analysis	January 2013	
c. Risk Prioritization	January 2013	
d. Safeguards and Controls Implementation	January 2013	
e. Baseline For Risk Monitoring, Corrective Actions, and Program Controls	January 2013	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- From February through June of 2010 – Participated in an Office of Information Security-sponsored (OIS) Risk Management Work Group charged with developing a state-wide risk assessment and management process, including acquiring a tool for automated assessments. Project is in hiatus due to budget and OIS staffing issues.
- January 2011 – CTA (Formerly OCIO) and the Office of Information Security has put the state-wide risk assessment and management project "on hold," including acquiring a tool for automated assessments. In lieu of state-wide guidance, I plan to review other models and utilize another risk assessment methodology until a state-wide, automated tool is available.
- March 2011 - A project to create a State-wide Risk Assessment/Management Methodology is still "on hold." In lieu of "new" formal, state-wide guidance, CDVA will adopt a hybrid approach to Risk Management; using a 2008 Risk Assessment Document developed by the Office of Information Security and guidance developed by the National Institute of Standards and Technology (NIST).
- June 2011 – The State-wide Risk Assessment/Management standardization efforts are "on hold." In lieu of a "new" formal, state-wide guidance, CDVA has adopted a hybrid approach to Risk Management; using a 2008 Risk Assessment Document developed by the Office of Information Security and guidance developed by the National Institute of Standards and Technology (NIST). Application of said guidance is forthcoming.

Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 3: Implement Enterprise Architecture (EA) to align business and technology

Objective 1: Develop CDVA's EA framework to establish EA program and increase EA program's maturity
Projected Date for Achieving the Objective: October 2011
Performance Measures (what are the metrics?) <ul style="list-style-type: none"> EA Program documentation developed and approved EA policies, processes and procedures established The successful formulation of the executive advisory board and management review board. Validation of Business Reference Models (BRM), Technical Reference Models (TRM) and Services Reference Models (SRM) EA policies, processes and procedures shared and being used at CDVA.
Resources Needed: It is estimated to take Senior ISA about 10% of their time to complete step #3. It is estimated to take 25% of their time to complete step #4 through item 4c. Step 4d will be resourced after recommendations are accepted.
Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Document basic IT architecture		
a. Business Reference Model		June 2009
b. Technical Reference Model		June 2009
c. Service Reference Model		June 2010
2. Develop governance structure		
b. Executive Advisory Board (EAB)	October 2010	October 2010
c. Management Review Board (MRB)	October 2010	October 2010
3. Publish EA deliverables		
a. Analyze and document plan on deliverables to be published.	February 2011	February 2011
b. Develop content for EA Intranet page	March 2011	March 2011
c. EA Deliverables moved to new EA Intranet page	May 2011	
4. Document Strengths and Improvement for EA Program		
a. Analyze and document EA program	August 2011	

strengths and areas for improvement		
b. Make recommendations to management	September 2011	
c. Accept, revise, or reject recommendations	October 2011	
d. Plan and implement recommendations	TBD	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- November 2010 - Both Management Review Board (MRB) and Executive Advisory Board (EAB) are functional. EA staff has yet to be determined due to budget constraints.
- January 2011 – Both the EAB and MRB had meetings in January. They are both scheduled for regular monthly meetings.
- March 2011 – Both the EAB and MRB continue to meet monthly as scheduled. During the past quarter the EA program has helped establish a staffing re-direction process when vacancies occur. The EA Intranet page is under construction with the EA Concept and Staff Proposal process for redirecting vacant positions is currently available on the intranet for departmental use.
- June 2011 – EAB continues to meet monthly. The recent MRB sessions have been canceled. An EAB intranet page has been added to the department's intranet site for EAB updates and related EAB forms.

Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 4: Leverage technology to improve program efficiency

Objective 2: Automate manual processes using web services
Projected Date for Achieving the Objective: September 2013
Performance Measures (what are the metrics?) <ul style="list-style-type: none"> • A process will be developed and maintained that lists all manual processes and the priority for automating them. • The work plan for automating manual processes will be complete and maintained. • The top 2 processes that provides customer benefit will be automated by CDVA staff.
Resources Needed: Staffing from the Project Management Office/Application and Web Section – Staff Information Systems Analyst (2), DPM III Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Develop a method to identify and maintain a list of processes to be automated		
a. Identify SME's to identify manual processes	May 2011	
b. Define method to prioritize processes to be automated	April 2011	
c. Identify and document processes to be automated	July 2011	
d. Prioritize processes to be automated	August 2011	
e. Maintain list of processes to be automated	August 2011 (ongoing)	
2. Develop the Manual Process Automation Work Plan		
a. Determine whether processes will use internal or external resources	October 2011	
b. Determine technology requirements for processes	October 2011	
c. Determine resources required and availability	October 2011	
d. Identify Procurement Requirements	October 2011	
e. Create process to develop and implement automated processes	January 2012	
f. Automate Manual Processes with Internal	January 2013	

Staff		
g. Develop and implement procurement vehicles for Automated Processes requiring external development	January 2012	
h. Develop Automated Processes requiring external development	May 2012	
i. Test automated processes	June 2013	
j. Create Implementation Plan	June 2013	
k. Implement Automated Processes	September 2013	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- December 2010 - The work on this will not begin until implementation of OWH 2.0 has been completed. Estimated start date is May 2011. The project was to begin February 2011, however, dates were re-baselined due to the OWH Initiative.
- March 2011 – OWH 2.0 (CalVet Connect - MyCalVet) was released in February. Additional functionality has been requested by Vet Services:
 - Admin Module to maintain email changes (Number 1 priority)
 - Initial Vet registration data to be sent electronically to VetPro for CVSO's use
 - Review Altarum's database that contains services (what to do until it's incorporated into MyCalVet)
 - EDD – loss of personnel – need to determine best technical alternative to share data with EDD without comprising the MyCalVet schedule

Therefore this task will be re base lined due to supporting the Department's #1 initiative –

CalVet Connect. Dates will be forthcoming.

- June 2011 – This objective will be reevaluated based on the new Strategic Plan 2011-2016.

Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 4: Leverage technology to improve program efficiency

Objective 3: Help desk process improvement
Projected Date for Achieving the Objective: September 2012
Performance Measures (what are the metrics?) <ul style="list-style-type: none"> • Consolidation and re-organization of help desks • Develop technician skill sets to run help desk • Report ticket history of user's problems and issues
Resources Needed: It is estimated to take four resources from the Customer Support and the Application and Web Sections and they will dedicate about 25% of their time to this effort. 2-Staff Information Systems Analyst (Supv); 1-Data Processing Manager III, 1-Associate Information Systems Analyst.
Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Define help desk opportunities and vision		
a. Determine help desk functional requirements	October 2011	
b. Develop help desk vision and strategy	December 2011	
c. Determine help desk best practices	January 2012	
2. Gap analysis		
a. Document "as is" processes	February 2012	
b. Document "to be" processes	March 2012	
c. Create Gap Analysis	April 2012	
3. Design and build new help desk processes	September 2012	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- Activities for this plan of action have not yet begun
- March 2011 – No new update

- June 2011 – This objective will be reevaluated based on the new Strategic Plan 2011-2016.

Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 5: Promote extensive use of project management, concepts, and principles throughout the agency

Objective 1: Increase CDVA project management skill sets and formalize project initiation
Projected Date for Achieving the Objective: July 2014
Performance Measures (what are the metrics?) <ul style="list-style-type: none"> • Completed matrix identifying current skill sets • Completed listing of project management courses • Completed and approved project management handbook • Documented project initiation process and standards • Completed training of tool
Resources Needed: Current resources include the PMO: (1) Data Processing Manager II (2) Sr. Information Systems Analysts (2) Staff Information Systems Analysts (1) Associate Information Systems Analyst Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Identify, analyze, and document CDVA's current skills		
a. Develop survey to identify current skill sets within each program	January 2013	
b. Develop listing of recommended project management courses	April 2013	
c. Develop project management handbook of guidelines	January 2014	
d. Approval of handbook	March 2014	
e. Distribute handbook	May 2014	
f. Market handbook	June 2014	
g. Training	July 2014	
2. Formally document the project initiation process and standards		
a. Present concept to Management Review Board	October 2013	

b. Present concept to Executive Advisory Board	November 2013	
3. Implement approved project initiation process		
a. Market and mentor project managers on use of the tool	July 2014	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- Activities for this plan of action have not yet begun
- March 2011 – No new update – project not to begin until January 2013
- June 2011 – This objective will be revised and re-baselined in the Strategic Plan for 2011-2016

Administrative Services Strategic Goals Implementation Plan

Division: Information Services Division

Strategy 5: Promote extensive use of project management, concepts, and principles throughout the agency

Objective 2: Establish IT project oversight as a service
Projected Date for Achieving the Objective: June 2015
Performance Measures (what are the metrics?) <ul style="list-style-type: none"> • Documented scope, activities, and roles and responsibilities • Completed matrix detailing skill sets needed and currently lacking • Completed recommendations for increasing skill sets • Document oversight services, procedures, and roles and responsibilities • Plan approval and implementation
Resources Needed: Current resources include the PMO: (1) Data Processing Manager II (2) Sr. Information Systems Analysts (2) Staff Information Systems Analysts (1) Associate Information Systems Analyst Include budget data, applicable dollars and positions, currently being directed to attaining this objective or explanation of how you will obtain resources.

Plan of Action:

What interim steps are necessary to attain goal?	When will they be completed?	Date completed
1. Define the service proposal		
a. Define scope of project oversight	July 2014	
b. Project oversight activities	July 2014	
c. Identify roles and responsibilities	July 2014	
2. Identify, analyze, and document skill levels		
a. Determine skill level needed for all activities	August 2014	
b. Identify and document which skills are lacking for each activity	October 2014	
c. Recommendations for increasing skill levels	November 2014	
d. Approve recommendations	December 2014	
e. Implement recommendations	January 2015	
3. Service Implementation Plan		
a. Document oversight services available	March 2015	
b. Procedures for using oversight services	March 2015	
c. Document roles and responsibilities	March 2015	

d. Plan approval	April 2015	
e. Implement plan	June 2015	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc.)

Current status:

- Activities for this plan of action have not yet begun
- March 2011 – No new update – project not to begin until July 2014.
- June 2011 – This objective is under review for the new Strategic Plan for 2011-2016

Human Resources Division

Strategy: Expand training opportunities to encourage upward mobility and mentor staff in support of the Department's program areas and Veterans Homes.

Objective. Facilitate training seminars and other training opportunities to promote and encourage upward mobility and to close skill gaps in current workforce due to anticipated attrition and retirement. Reduce offsite training costs by bringing training in-house.
Projected Date for Achieving the Objective: January 30, 2013
Performance Measures: <ul style="list-style-type: none"> Review participant evaluations for feedback after first year (2012) to determine program viability and effectiveness Success will be determined when program is implemented statewide
Resources Needed: <ul style="list-style-type: none"> HALO Online Training: 1-year subscription for HQ and Barstow \$48,000.00

Plan of Action – Training / Recruitment

What interim steps are necessary to attain goal?	When will they be completed?	Completed?
Survey managers and supervisors to identify possible seminar topics	10/31/10	Completed
Develop Career Ladder Power Point	1/30/11	Completed
Facilitate two training seminars annually in March and April to rank and file staff and supervisors to coincide with the request for annual training needs and development of the CalVet Annual Training Plan. Introduce the new training product, HALO.	5/30/11	Completed
Post-seminar evaluations/assess viability/change as necessary	6/1/11	In Process
Coordinate the implementation of HALO On-line Training Pilot Project at Headquarters, District Offices and Barstow.	6/1/11	In Process
Develop Training Portal on CalVet intranet and post all training presentations on intranet.	6/30/11	
Facilitate meetings with Homes and District Offices to discuss options for implementation of seminars in their location	1/30/12	
Statewide implementation/standardized procedures at all Homes	1/30/13	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Training Coordinator position vacant. New Training Coordinator hired effective 10/1/10. She has begun resource search for development of survey to managers/supervisors to identify skill gaps.
Coordinated Human Resource Modernization Project Team to come to CDVA for a workshop on "Leadership Competency Model" and "Onboarding."

Survey responses to Upward Mobility and Skills Gap responses due on 1/7/11. Completed.
Employee Exit Survey and New Employee Survey developed and ready for release to collect data from exiting and new employees to the CDVA. Data collection in progress.
New Training Policy is ready for release pending decision on funding to support Education. New policy includes promoting upward mobility and career related training and provides information on Education reimbursement opportunities. Completed.
Upward Mobility Power Point Presentation has been developed. Will be scheduling seminars for headquarters staff pending decision on scheduling during work hours or lunch time. Completed.
Upward Mobility and Training presentations have been completed and offered to staff at Headquarters. Completed.
Currently working on the review of the class assessments and the implementation of HALO. In progress.

Strategy: Develop and maintain a workforce plan that is aligned with the Department's strategic direction.

Objective. Assist Workforce Planning Committee by creating a workforce plan for the Human Resources Division (HRD) that addresses changes in personnel.
Projected Date for Achieving the Objective: June 30, 2013
Performance Measures: <ul style="list-style-type: none"> ▪ Develop and evaluate current / future HRD workforce profile ▪ Determine HRD staffing aspects that require attention ▪ Develop strategies ▪ Execute plan ▪ Monitor and change as needed
Resources Needed: <ul style="list-style-type: none"> ▪ Workforce Planning Focus Group (one representative per division)

Plan of Action – **Workforce planning committee participants (HRD)**

What interim steps are necessary to attain goal?	When will they be completed?	Completed?
Analyze current HRD workforce	6/30/2011	In process
Project anticipated changes to HRD workforce	6/30/2011	In process
Evaluate workforce profile to identify staffing deficiencies within the HRD and potential vacancies in key leadership positions	1/30/2012	
Develop planning strategies based on evaluation, to include succession planning	1/30/2013	
Execute overall workforce plan for the HRD	6/30/2013	
Maintain plan summary for tracking purposes	ongoing	
Monitor	ongoing	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Stacey Frank is currently attending workshops on Workforce Planning, October 27-29 and December 3 rd .
Stacey developed first draft, Jack reviewed and returned with changes, changes incorporated, expanding plan
Stacey is scheduled to attend Workforce Planning Training January 24-26, 2011.
Stacey has attended several Workforce Planning Meetings with the statewide coordinator at the Department of Personnel Administration and she continues to update the draft plan as she receives new information.
Stacey is analyzing 2007-2010 MIRS report information to update and expand the Workforce Plan.
Stacey and Pam attended the Workforce Planning AdHoc meeting on 4/12/11 presented by Human Resource Modernization Project. There is a plan to assemble a Workforce Planning Group within CDVA. Stacey plans to meet with Angela Yamamoto to discuss the results of the Employee Perception Survey and how those might impact the Workforce Plan.

Strategy: Develop a formal Employee Onboarding Program at Headquarters and District Offices. Once fully implemented at Headquarters and District Offices, share with the Personnel Officers for Veterans Homes use. The goal is to reduce employee turn over, protect our recruitment investment and increase employee morale.

Objective. Develop a culture where the agency's mission, vision and goals are consistently promoted and practiced statewide at Headquarters and the Veterans Homes.

Projected Date for Achieving the Objective: June 30, 2013

Performance Measures:

- Review new employee evaluations and employee exit evaluations for feedback.
- Success will be determined by percentage of positive feedback by employees.

Resources Needed: Provided In-House (1 Supervisor / 1 Associate Personnel Analyst) = \$0.00

Plan of Action – Training / Recruitment

What interim steps are necessary to attain goal?	When will they be completed?	Completed?
Develop Onboarding Supervisor's Checklist.	1/31/12	
Develop Supervisor's Onboarding Online Training Module.	2/28/12	
Evaluate/assess via CDVA New Employee and Exit Survey(s).	6/1/12	
Facilitate meetings with Homes and District Offices to discuss options for implementation at their location.	1/30/13	
Statewide implementation/standardized procedures at all Homes.	6/30/13	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Strategy: Utilize advancing technology to more effectively deliver Human Resources practices in support of the Department's program areas and Veterans Homes.

Objective. Centralize the Department's Human Resources information into an online database (i.e., Administrative Manual)
Projected Date for Achieving the Objective: March 30, 2014
Performance Measures: <ul style="list-style-type: none"> Success to be measured by the percentage of HR information transferred to the online Administration Manual (to 100%).
Resources Needed: <ul style="list-style-type: none"> Internal resources only

Plan of Action – **Human Resources Division**

What interim steps are necessary to attain goal?	When will they be completed?	Completed?
Identify policies and procedures to convert	3/30/2011	100%
Coordinate consolidation with Homes	10/30/2011	In progress
Review to ensure consistency in policies and procedures throughout department / Revise as needed	3/30/2013	
Implement conversion	3/30/2014	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Conducted review of all policies and manuals currently on CDVA's Intranet related to HR. Have identified 52 policy memos. Continuing to review additional materials on website which may be consolidated into the Administrative Manual.
Thirteen of the existing 52 Human Resource Info/Policy Memos have been reviewed, updated and are scheduled to be incorporated into the Admin Manual.
Twenty five HR Information/Policy Memos have been identified, approved and incorporated into the Administrative Manual. Forms and links are being reviewed and updated. The remaining Information Memos will not be converted to the Administrative Manual as these are annual notices.
In the process of adding three forms to the intranet. After ISD has posted the additions, Chapters 7, 20 and 21 of the Administrative Manual will be forwarded for consolidation with other updates and posting to the intranet.

Strategy: Utilize advancing technology to more effectively deliver Human Resources practices in support of the Department's program areas and Veterans Homes.

Objective. Streamline the administration of departmental exam processes to accelerate exam timeframes and list creation.
Projected Date for Meeting Goal: January 30, 2015
Performance Measures: <ul style="list-style-type: none"> As supported by job analysis, convert exams for mission-critical classifications to supplemental application exams. Success to be measured by maintaining a database that identifies the classifications and tracks job analysis progress and revised exam plans. Develop and implement process to accept supplemental exam applications electronically. Success to be measured by maintaining a database that monitors progress of online implementation, bulletin release dates, testing time frames, and resulting eligible lists.
Resources Needed: <ul style="list-style-type: none"> Subject Matter Experts Travel funds Partnership with Information Services Division for development and implementation

Plan of Action – **Exam Unit**

What interim steps are necessary to attain goal?	When will they be completed?	Completed?
In coordination with Veterans Homes, identify mission critical classifications	1/30/2012	15% complete
Evaluate exam plans to determine deficiencies (e.g., outdated/no job analysis)	3/30/2012	15% complete
Update/complete job analysis studies as required	1/30/2013	10% complete
Convert exams to supplemental applications, as supported by job analysis	6/30/2013	
Develop strategies for accepting supplemental application exams electronically/online	1/30/2014	
Implement strategies	1/30/2015	
Monitor and make changes as needed	6/30/2015	

Progress Report (Current status, issues impacting goal attainment, changes in timelines, resource impacts, etc)

Currently working with the Homes on selected classifications to review job analyses (JA) and determine if previous JAs are sufficient, if not, updating JAs.
Staff is working on converting testing for mission-critical medical classifications to the OSS online system with supplemental application submission process to better meet the needs of our Veterans Homes